

SPiRiT e-Procurement System

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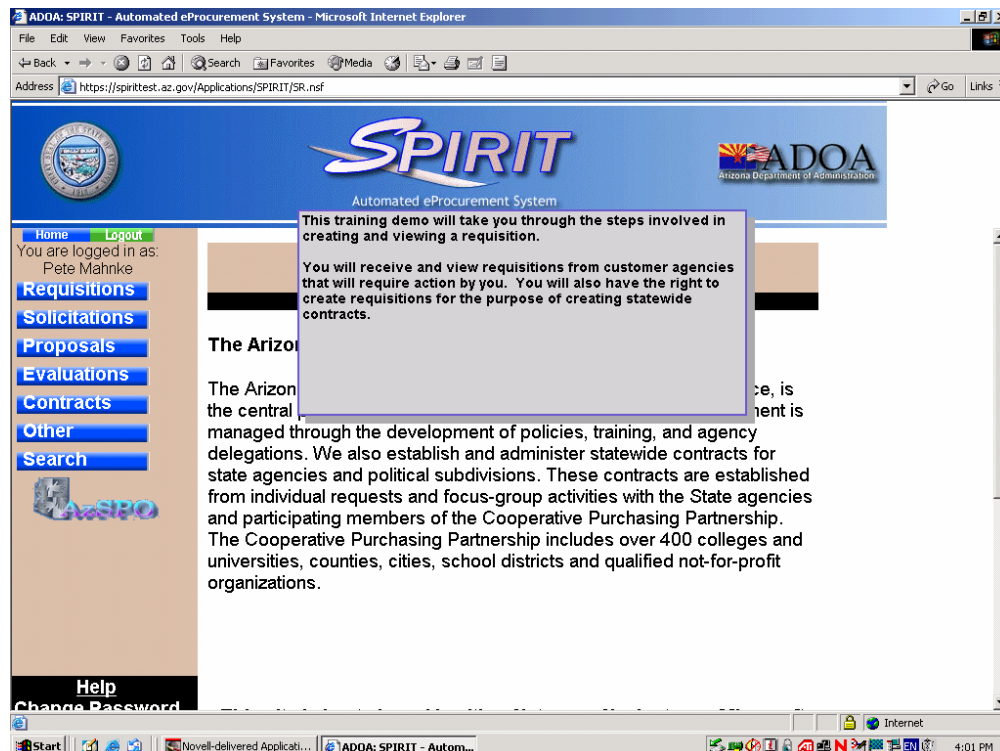
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Creating a Requisition

Background Information

Essential background information on this topic includes the following:

- This document covers the process of creating a requisition. During the necessary steps involved it will also cover reacting or responding to a requisition received from a customer agency. In most, if not in all situations, YOU, the Procurement Officer (PO) will be the customer agency user as well. SPIRIT was programmed to allow the customer submitting the requisition to play a role in reviewing and approving solicitation documents. The requisitions for Statewide contracts are, the majority of the time created by the Procurement Officer (PO). This necessitates your playing both roles.
- The receipt or creation of the requisition is the first step in the procurement process within the Spirit system. Once received or completed, the process calls for creating a Procurement Plan or PP. The PP then becomes the document that links the procurement in all its stages.
- The PP will be the first document that you will need to submit to the customer for approval. Once you submit to the customer, you will need to go back into the PP and submit to the PO for approval.



This document will take you through the steps involved in creating and viewing a requisition.

After logging in to the Spirit system, Click on the **Requisitions** tab to open the menu options for all things requisition related. The requisitions tab will expand to include the options below.



To view your requisitions received from a customer or created by you, Click on the **My Requisitions** tab.

The Spirit system will notify you via e-mail when a new requisition is received.

Click on the **All Requisitions** tab to view a list of all requisitions received by everyone included in your Government Entity (GE).

Click on the **My Procurement Plans** tab to view procurement plans or PPs that you have begun (draft) or published.

As you will see later in the training, everything in the process is tied to this document.

To begin, we will create a requisition.

Click on the **Create Requisition** tab


SPIRIT: New Requisition

Requisition #:ADSM-5QJUW6

Page loaded on 08/18/2003 at 03:56:12 PM.

 • = Required Field

Document Information				?
Requisition #:	ADSM-5QJUW6	Solicitation #:	TBD	Contract #:
Created By:	Pete Mahnke/Arizona State Procurement Office		Date Created:	08/18/2003
Gov't Entity:	Arizona State Procurement Office		PO Assigned:	TBD
Process Status:	Requisition Creation		Status:	Draft

Note  Any fields with the red dot are mandatory or required fields.

This first row of fields contains:

Requisition #: the Spirit system assigns a number to the requisition at its creation.

Solicitation #: status at this point is TBD or To Be Decided. The Spirit system automatically assigns this as well when the Procurement Plan is created. However, its assigned number will not be viewable to users (including yourself) until the Procurement Plan is complete.

Contract #: status at this point is the same as Solicitation number. This will not be assigned until a contract has been created. The format will follow the same format that the State Procurement Office has for a number of years now, ADXXXXXX . Strategic Contracts will have a different acronym, but the same format. Each supplier awarded will have a designation of -1, -2, -3, etc.

SPIRIT: New Requisition

Requisition #:ADSM-5QJUW6

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 • = Required Field

Document Information					?
Requisition #:	ADSM-5QJUW6	Solicitation #:	TBD	Contract #:	TBD
Created By:	Pete Mahnke/Arizona State Procurement Office		Date Created:	08/18/2003	
Gov't Entity:	Arizona State Procurement Office		PO Assigned:	TBD	
Process Status:	Requisition Creation		Status:	Draft	

This next row of fields lists the person that created the requisition.

Note that the name of the person is a link. You may click on any links you see in the Spirit system to view relevant information for that link. In this instance the link brings you to the requisition creators profile, which contains their contact information, etc..

Date Created: Is the date the requisition was created in the Spirit system.

SPIRIT: New Requisition

Requisition #:ADSM-5QJUW6

Page loaded on 08/18/2003 at 03:56:12 PM.

 • = Required Field

Document Information					?
Requisition #:	ADSM-5QJUW6	Solicitation #:	TBD	Contract #:	TBD
Created By:	Pete Mahnke/Arizona State Procurement Office		Date Created:	08/18/2003	
Gov't Entity:	Arizona State Procurement Office		PO Assigned:	TBD	
Process Status:	Requisition Creation		Status:	Draft	

Gov't Entity: defines the Agency or office the creator of the requisition is assigned to. This link may also be clicked on to view address information as well. When in a government entity profile, you will be able to view users profiles of those assigned to that office, by clicking on their links in the government entity profile.

PO assigned: is the Procurement Officer that the requisition will be assigned to. The Spirit system assigns requisitions by commodity code. The PM or Procurement Manager for a particular PO has the user rights that allows for the reassignment of any requisition (reassignment functionality is first available at the Procurement Plan), whether the reassignment is due to workload or the requisition did not reach the appropriate PO. The PA and Spirit Administrator have this functionality as well.

This particular requisition has not been assigned due to the fact that it has not had any commodity codes assigned to it yet. That takes place during the line item creation phase.

SPIRIT: New Requisition

Requisition #:ADSM-5QJUW6

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 • = Required Field

Document Information					?
Requisition #:	ADSM-5QJUW6	Solicitation #:	TBD	Contract #:	TBD
Created By:	Pete Mahnke/Arizona State Procurement Office		Date Created:	08/18/2003	
Gov't Entity:	Arizona State Procurement Office		PO Assigned:	TBD	
Process Status:	Requisition Creation		Status:	Draft	

The fields in this row track the various statuses of the requisition.

Process Status covers the entire procurement process status.

Status, tracks the status of the document you are viewing or working on.

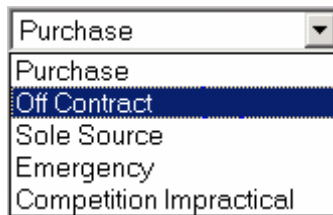
Ship To Address				
• Address:	<input type="text" value="100 North 15th Avenue"/> <input type="text" value="Suite 104"/>			
• City:	<input type="text" value="Phoenix"/>	• State:	<input type="text" value="AZ"/>	• Zip:
				<input type="text" value="85007"/>
• County:	<input type="text" value="Maricopa"/>			

Ship To Address loads from the requisition creator's government agency profile. If the Ship to is a different location, they can type in the appropriate location.

These next screens will break down the various types of requisitions you can create/receive in the Spirit system.

Click on the drop down menu  to select the requisition type.

Note the options



The **Purchase** requisition routes to the PO for action.

The **Off Contract** purchase requisition routes to the PO for recommendation. When complete it routes to the PA or Procurement Administrator for final approval/rejection.

The **Sole Source** requisition, like the Off Contract requisition routes to the PO for recommendation. When completed by the PO it routes to the PA for final approval/rejection.

The **Emergency** requisition routes directly to the PA for approval/rejection. If approved within the Spirit system, it will then route to the appropriate PO by commodity code for action.

The **Competition Impractical** routes to the PO for recommendation. Upon completion it routes to the PA for final approval/rejection.


Each of the requisition types other than Purchase requires the fields included above. Each wraps the characters typed, so if additional space is needed, the user can just keep typing. Also, as with many documents in Spirit, they may attach any files necessary.

The Purchase requisition only requires a Short and Full description.

The Spirit system loads the fields necessary dependant upon the type select.

The Purchase requisition will be used for the purpose of this section

From the Requisition Type drop down menu Click on **Purchase**

From the drop down menu  the Requested By Date is selected.

This date represents the date by which the customer (remember, you will likely be playing that role as well), would like the procurement completed.

A brief description of the requisition must be typed in the Short Description field. A longer, more definitive description is typed into the Full Description field.

Both the Short and Full Description language entered will be used as criteria for searching for the various documents in the Spirit system.

The **Suggested Suppliers** section allows for the inclusion of additional suppliers to the solicitation beyond those selected by the Spirit system by commodity code.

The Spirit system does not select the suppliers until the price sheet has been created in the solicitation draft.

The auto selection of suppliers is also dependant upon what type of requisition is created.

Purchase - selects all suppliers by code

Off Contract - allows for the use of a supplier listed in the requisition, added in the solicitation draft or the auto selection by Spirit

Sole Source - does not generate a supplier list and uses the supplier included in the requisition or solicitation draft

Emergency - does not generate a supplier list and uses the supplier included in the requisition or solicitation draft

Competition Impractical - does not generate a list and notifies the supplier listed in the requisition, however, the solicitation itself is viewable and respond able by other suppliers if they access it in the All Solicitations list available to them. Again you may also add the supplier at the solicitation draft stage.


NOTE The Spirit system does not generate a suggested supplier list for **RFQs**. Each supplier must be selected from the database.

ADDING SUPPLIERS

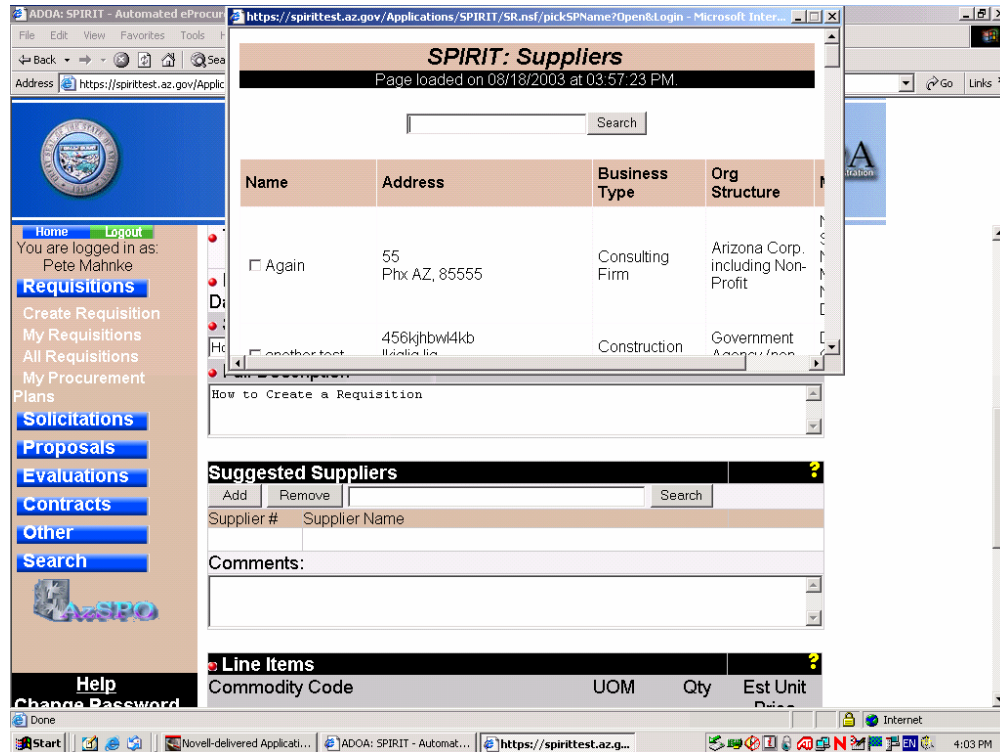
The various methods for finding and adding suggested suppliers will now be covered

Best practice when searching for anything in the Spirit system is to use the wildcard in your searches. The wildcard tells the search engine to search for your criteria with anything that follows it. The Spirit system uses an asterisk * as the wildcard. Example: Joe* the results of which would be all suppliers starting with Joe.

Suggested Suppliers		?
Add	Remove	Search
Supplier #	Supplier Name	
Comments:		

One way to select suppliers is by clicking on the  button. This will open a window containing the entire Spirit database

Click on the  button



The above SPIRIT: Suppliers window will open displaying the list.

Scroll down through the list. To select a supplier, click within the checkbox ☐. You then scroll to the bottom of the screen and Click on the **OK** button to select those suppliers checked or cancel. The supplier(s) selected will now be listed in the area as designated by the red X in the image on the next page

Suggested Suppliers		?
Add	Remove	Search
Supplier #	Supplier Name	
X	X	

At the bottom of the search results page, you may also Click on the [Next Documents -->](#) and [<-- Previous Documents](#) links to continue going through the list. By doing this though, none of the suppliers you may have placed a checkmark next to will load into the requisition

Suggested Suppliers		?
Add	Remove	Search
Supplier #	Supplier Name	
	J*	

Another option is to type a known supplier name in the search field then click on the **Search** button. Or you may type in a partial search. J* the beginning of a known name with the asterisk * as a wildcard.

The results of which will open the same window with suppliers listed that match the criteria. You would then scroll through the list and select the supplier(s) you are looking for, as done in the previous example.

Note When searching, you may also enter search criteria in the Search Results window search field and continue your search from their. See image below

Name	Address	Business Type	Org Structure	MBI
<input type="checkbox"/> Jimmi Gizmo's Gizmos	16 Sixteenth St Ploostan HI, 88888	Wholesaler	Arizona Corp. including Non-Profit	Small Business Minority Owned Business
				Small Business

To remove any selected suppliers:

Click on the button.

A window like the one you used to select suppliers will open with a list of those you selected.

Place a checkmark in the checkbox ☐ to the left of supplier(s) you wish to remove, scroll to the bottom of the screen and Click on the OK button.

Note The Comments window is not mandatory however, you may make any comments you feel is necessary regarding the suppliers added.

LINE ITEMS

We will now cover adding line items. Like Azpex, the supplier database has appropriate commodity codes selected by the suppliers when they registered. Clicking on the Select button will open a window with all codes in the databases. You would scroll through this as demonstrated previously with the Suggested Suppliers. Selecting the desired code is different in that you Click on the commodity code link to select it, rather than clicking in the checkbox.

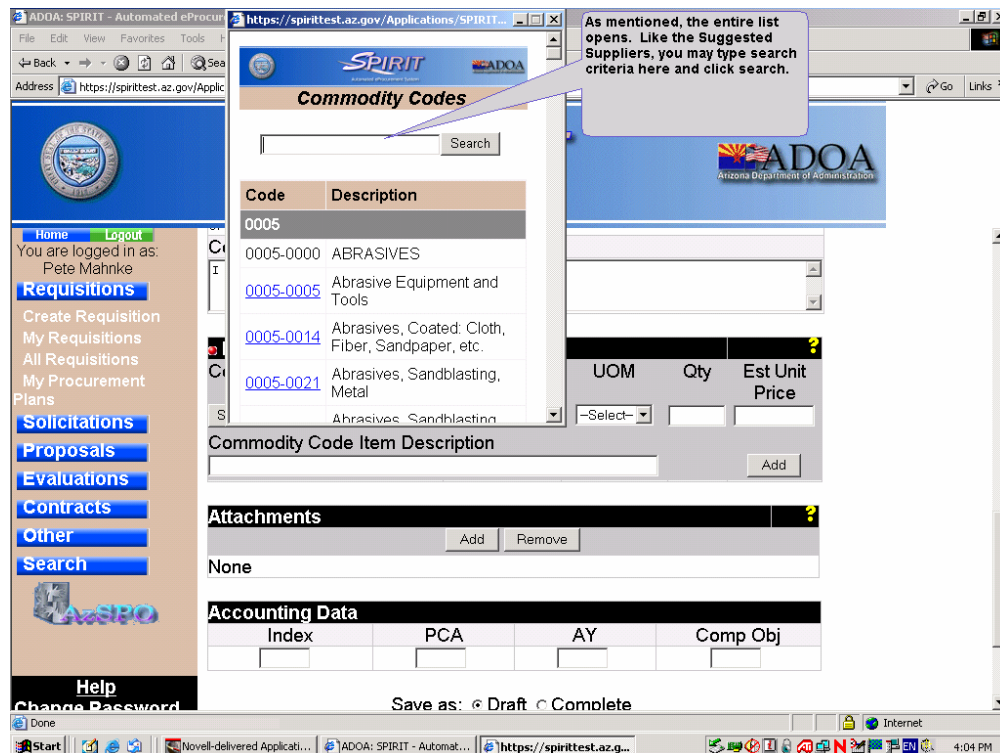
Or you may enter written criteria in the Search window (example, tire*) and Click on the Search button.

Or you may enter a known or partial code and Click Search.

Remember, for best results use the wildcard *

First we will go the laborious route, which opens the database listing all commodity codes.

Click on 



ADOA: SPIRIT - Automated eProcurement

Address: https://spirittest.az.gov/Applications/SPIRIT...

Commodity Codes

Search

Code	Description
0005	
0005-0000	ABRASIVES
0005-0005	Abrasive Equipment and Tools
0005-0014	Abrasives, Coated: Cloth, Fiber, Sandpaper, etc.
0005-0021	Abrasives, Sandblasting, Metal
	Abrasives, Sandblasting

UOM Qty Est Unit Price

-Select- [] []

Commodity Code Item Description

Add

Attachments

Add Remove

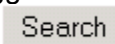
None

Accounting Data

Index	PCA	AY	Comp Obj

Save as: Draft Complete

As mentioned, the entire list opens. Like the Suggested Suppliers, you may type search criteria here and click search.

As mentioned, the entire list opens. Like the Suggested Suppliers, you may type search criteria in the search field within the list and click .

Note

The code is a link [0031-0045](#). This is how the commodity codes are selected. Just click on the desired code, Spirit will close the commodity code window and load the code into the requisition. If you wish, you may click on the Close button or click on Previous or Next Documents to continue through the list.

Clicking on 0031-0045 loaded the code into the Line Item section of the requisition as displayed above.

Even though the code is listed, it is not completely linked to the line item until you click the ADD button below, which you will see further on in the process. There are a couple more steps to be taken yet.

Another means of searching is by typing a known or partial code in the Search field. If the new code is selected, it will replace the one presently showing on the screen.

If you were to type 0070* in the search window the results listed would be all codes with 0070 as the commodity class and those with 0070 as subclass.

Note the results. The search was done using 0070. The codes returned were those that contain 0070 anywhere. It could be as the first one is; the sub-class or 0070 could lead as the commodity class.

To further refine the search, the wildcard comes in to play:

*-0070 would result in the refinement being codes with 0070 as subclass

0070-* would result in the refinement being commodity the commodity class of 0070 and its subclasses.

Note that a dash or hyphen was used at either end. That is a further definition of the criteria as it is a separator of commodity and subclass.

SPIRIT: Search Results

0070-0018 Search

1 Documents Found

Code	Description
0070-0018	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles)

Close

Attachments

Add Remove

None

Accounting Data

Index	PCA	AY	Comp Obj

Save as: ☒ Draft ☐ Complete

Submit Reset

The above screen shot reflects searching for a specific commodity code. This is the more likely way we would use this functionality as many may search out a commodity code(s) prior to creating a requisition.. Simply type in the code, in this instance I used 0070-0018 and clicked on search. The code is the only result of the search.

As mentioned previously, if you selected one of these codes it would replace the code presently loaded into the requisition.

When you reach these areas familiarize yourself with various ways to search. Practice makes perfect.

By this point, you may have wondered how you include additional commodity codes if each time you select one it replaces the other. The answer if you haven't guessed it is that once you complete a line item by filling out the rest of the information and ADDing it, it is locked in. You would then proceed to include additional line items to further define your target procurement.

The only way to replace or change a commodity code selection once it has been ADDED is to delete the line item in its entirety.

More on that later.

Select a Unit of Measure from the drop down menu.

Type in the appropriate quantity, then Type in an Estimated Unit Price.

Obviously this is only an estimate. However, as it now when a customer creates a requisition it is the total estimated price that factors into to which procurement method is used. FYI: this fields accepts numerals and decimal points. It also allows for four decimal places

Commodity Code Item Description

This area might be used by the customer to further define the commodity code and subclass selected. At the time of solicitation price sheet drafting you will be selecting down to the commodity code item level.

Each line item created in a solicitation will have to be brought down the item description level. These will have to be created ahead of time for a given solicitation. If the customer breaks it down for you, it may give you a better idea of how to describe it.

However, in most if not all instances, you (the PO) will be the customer as well since you will be creating your own requisitions for Statewide contracts.

For Commodity Code Item requests see “Creating a Commodity Code Item” request following the section for creating a Supplier Information Request.

Once you have entered all Line Item relevant information Click on the **Add** button

LI #	CC	CC Description	UOM	Qty	Est Unit Price	Ext Price	
1	0070-0018	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles)	Each	10	\$ 10,000.00	\$ 100,000.00	Remove

Above is how the line item will appear in the requisition once you have added it. Note the **Remove** button. Clicking on it will delete the line item created in its entirety.

Note that the commodity code is a blue link. Clicking on it would open the window below allowing for the editing of UOM, Qty, Est Unit Price and commodity code item description.

Make the available changes and click on **Submit**. If you don't wish to make changes click on the **Cancel** button. Any changes you make can be **Reset** by clicking on that button.

A completed line item will resemble the image above

ATTACHMENTS

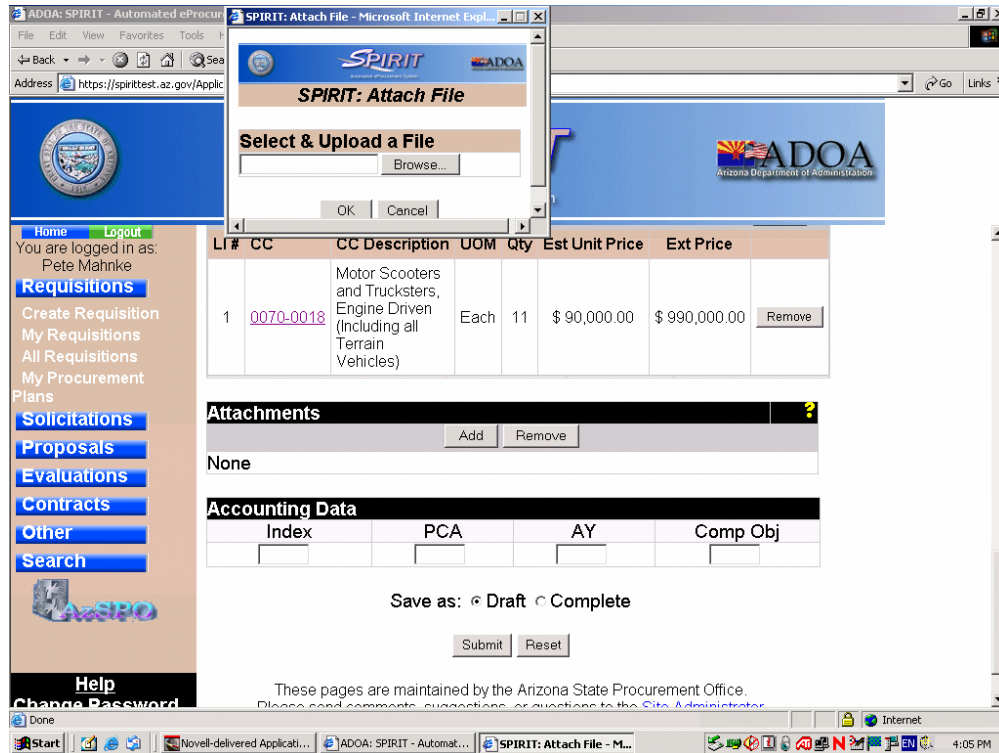
The Attachment functionality is much like that, with which we include files with an e-mail.

The customer or you may add several documents to the requisition, including the Scope of Work or Specification prior to it's being submitted as Complete. If not, you will still be able to attach either of those documents later during the solicitation draft stage.

When you do receive a Scope, you may want to save it elsewhere to allow for any editing that may be necessary. Any documents attached to the requisition will be available for the solicitation.

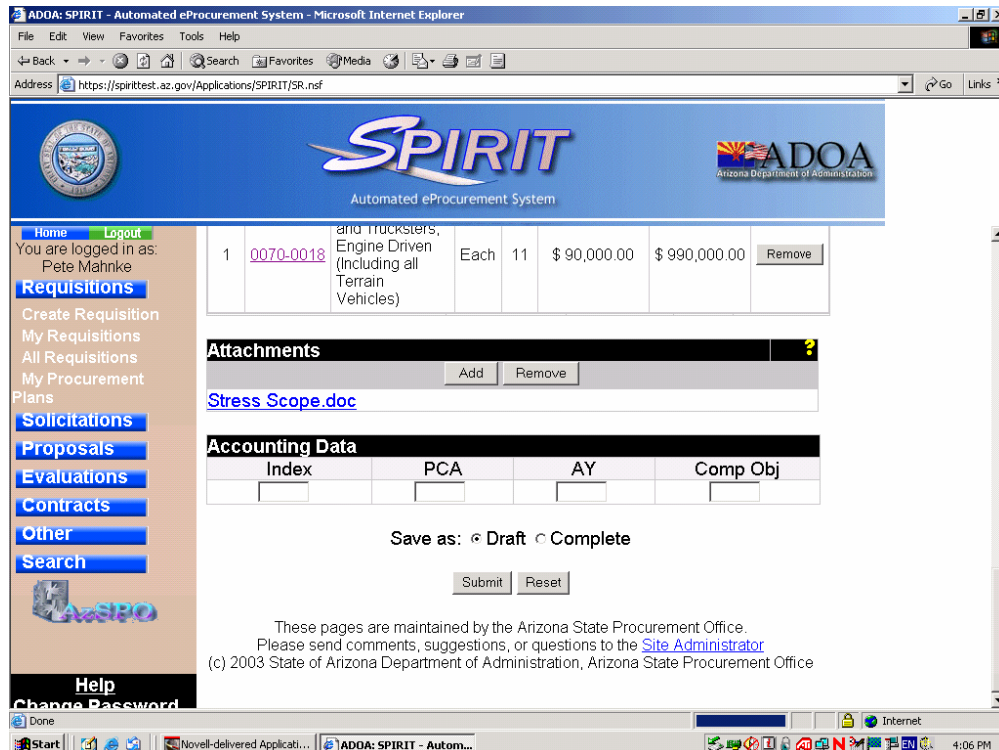
To include an attachment Click on

Add



The Attach File window opens. To locate the file, Click on **Browse...**

Locate the file you wish to attach and Click on **Open**. This will load the file into the Spirit: Attach File window. Either double click on the file icon or Click on the Open button

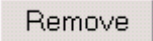


The file now appears in the Attachment section of the requisition.

Note: the time required for the document to attach is wholly dependent upon the size of the file. For instance, if the file is six (6) mb in size it could take a few minutes to attach. Just be patient.

To open for the purpose of saving or viewing Click on the filename link. This will open the document. If you received the requisition, you would be able to do a Save As with this file for further work and attach it during the solicitation draft stage, which will be covered later in the process.

Close it by clicking on the windows X

To remove any file attached to the requisition, Click on the  button. A smaller window listing the documents attached to the requisition will open. Each file will have a checkbox ☐ to its left. Place a checkmark in the box of the file you wish to remove then click OK.

Clicking on Submit will save the requisition as Draft, as the Spirit system default is set at draft.

If the requisition is Complete, change the Save as: to Complete and Click Submit.

Once submitted as complete, you will no longer be able to make any changes to the requisition. However, if any additional line items or commodity codes are needed, they may be added at the Price Sheet draft stage of the solicitation.

Accounting Data			
Index	PCA	AY	Comp Obj
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Save as: <input checked="" type="radio"/> Draft <input type="radio"/> Complete			
<div>Submit Reset</div>			

Note The Accounting Data section is not a functional part of the Spirit system at this time; however, information may still be entered.

Once submitted you end up in your My Requisitions area of the Spirit system.


NOTE: SPIRIT assigns and routes requisitions based upon commodity code. Once you have submitted the requisition as complete and are routed to your My Requisitions area look to see who the requisition was assigned to in the PO column (see image next page). If the commodity code used is not assigned to you, the requisition will not be assigned to you. Procurement Managers (PM) can change the PO assigned at the next step in the process; the Procurement Plan (PP).

SPIRIT could also assign the requisition to a Procurement Manager (PM) if there is a conflict with regard to commodity code assignment.

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://spirittest.az.gov/Applications/SPIRIT/SR.nsf> Go Links


Automated eProcurement System

Home Logout

You are logged in as:
Pete Mahnke

Requisitions

Create Requisition
My Requisitions
All Requisitions
My Procurement Plans

Solicitations

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Change Password

My Requisitions

Page loaded on 08/18/2003 at 04:00:38 PM.

Req #	Status	Title	PO	Requestor	Type	Est Price
ADSM-5QJLW6	Pending Procurement Plan	How to Create a Requisition	Pete Mahnke/Arizona State Procurement Office	Pete Mahnke/Arizona State Procurement Office	Purchase	\$ 990,000.00
ADSM-5QJRP4	Complete	STRESS TEST RFP	Pete Mahnke/Arizona State Procurement Office	Greg Dwight	Purchase	\$ 100,000.00
ADSM-5QJRNJ	Complete	Stress Test Training Session 2 RFP 2 Practice	Pete Mahnke/Arizona State Procurement Office	Greg Dwight	Purchase	\$ 100,000.00
ADSM-5QJRMW	Complete	Stress Test Training Session 2 RFP 2 Practice	Pete Mahnke/Arizona State Procurement Office	Greg Dwight	Purchase	\$ 100,000.00

Done

Start Novell-delivered Applicati... ADOA: SPIRIT - Automat... Internet 4:06 PM

Procurement Plan

Background Information

Essential background information on this topic includes the following:

- A Procurement Plan has to be created for every requisition that initiates a procurement in the Spirit system.
- All documents in the solicitation process are tied to the Procurement Plan dates
- Since performance is linked to dates met, you will want to identify the dates to be met as best as possible. The system tracks the variance in days.

Before You Begin

Before beginning the task, obtain the following information:

- You must have received or created a requisition prior to creating a Procurement Plan (PP). The link to create is only available in that document.
- As mentioned previously. If you have created the requisition for a solicitation that you must do; you will be the Procurement Officer (PO) and Customer. This does not require your logging out and in again.

Home Logout You are logged in as: Pete Mahnke		SPIRIT: How to Create a Requisition Requisition #:ADSM-5QJUW6 Complete Page loaded on 08/18/2003 at 04:02:17 PM.	
Requisitions Create Requisition My Requisitions All Requisitions My Procurement Plans		Solicitations Proposals Evaluations Contracts Other Search	
		Suspend Create Procurement Plan	
Requisition #:	ADSM-5QJUW6	Solicitation #:	TBD
Contract #:		Date Created:	08/18/2003
Created By:	Pete Mahnke/Arizona State Procurement Office		PO Assigned:
Gov't Entity:	Arizona State Procurement Office		Pete Mahnke/Arizona State Procurement Office
Process Status:	Pending Procurement Plan	Status:	Complete

The Procurement Plan here on in referred to as PP is created from the requisition. Once you have received or completed creating a requisition, the link to Create PP will appear at the top center of the Document Information section of the requisition. To create one, Click on Create PP.

The PP contains key dates in the procurement process entered by you that should be met during the process. Your PP, once completed will be forwarded to the customer for their review. If any dates selected by you are not acceptable to the customer, regardless of the reason, the customer can change those dates. The PP then routes back to you the PO with the changes and comments from the customer for your approval. Once agreement has been reached by both parties, the PP can be published. If agreement cannot be made a happy medium must be found. After the first few rounds, the PO has the user role authority to publish the PP if agreement cannot be made.

REMEMBER, if the PO creates the requisition, you shouldn't have any difficulty agreeing with yourself, however, you do still have to go through the process of Submitting to Customer for Approval (you in this instance). Once submitted for approval to the customer, you return to the PP, click on the edit icon and submit for approval back to the PO. Again, return to the PP, click the edit icon, select Publish and click on the submit button.

A better understanding of the process should be found by the time you finish viewing this section.




Document Information			
Requisition #:	ADSM-5QJUW6	Solicitation #:	TBD
Created By:	Pete Mahnke/Arizona State Procurement Office	Date Created:	08/18/2003
Gov't Entity:	Arizona State Procurement Office	PO Assigned:	Pete Mahnke/Arizona State Procurement Office
Process Status:	Pending Procurement Plan	Status:	Complete

The Suspend button is used to do just that, suspend the requisition. The suspend button was not available during the drafting of the requisition demo due to the fact that it does not appear until the requisition has been completed.

The PO and PM have the authority to suspend a requisition for various procurement related reasons. The PA has the authority to cancel the suspended requisition.

Once a PP has been started, the Create Procurement Plan link changes to View Procurement Plan. It can then be accessed by clicking on that link when viewable or by clicking on the My Procurement Plans under Requisitions at the navigation buttons to the left.

Home Logout You are logged in as: Pete Mahnke Requisitions Create Requisition My Requisitions All Requisitions My Procurement Plans Solicitations Proposals Evaluations Contracts Other Search 		<h3 style="text-align: center;">SPIRIT: How to Create a Requisition</h3> <h4 style="text-align: center;">Requisition #:ADSM-5QJUW6</h4> <p style="text-align: center; color: red;">Complete</p> <p style="text-align: center;">Page loaded on 08/18/2003 at 04:02:17 PM.</p>	
Document Information			
Suspend Create Procurement Plan			
Requisition #:	ADSM-5QJUW6	Solicitation #:	TBD
Contract #:	TBD	Date Created:	08/18/2003
Created By:	Pete Mahnke/Arizona State Procurement Office		PO Assigned:
Gov't Entity:	Arizona State Procurement Office		Pete Mahnke/Arizona State Procurement Office
Process Status:	Pending Procurement Plan	Status:	Complete

Note the status of the procurement process as well as the status of the requisition.

The Process Status reflects the next step.

Status: field to its right reflects the status of the document you are viewing.

Home Logout You are logged in as: Pete Mahnke Requisitions Create Requisition My Requisitions All Requisitions My Procurement Plans Solicitations Proposals Evaluations Contracts Other Search 		<h3 style="text-align: center;">SPIRIT: How to Create a Requisition</h3> <h4 style="text-align: center;">Requisition #:ADSM-5QJUW6</h4> <p style="text-align: center; color: red;">Complete</p> <p style="text-align: center;">Page loaded on 08/18/2003 at 04:02:17 PM.</p>	
Document Information			
Suspend  Create Procurement Plan			
Requisition #:	ADSM-5QJUW6	Solicitation #:	TBD
Contract #:	TBD	Date Created:	08/18/2003
Created By:	Pete Mahnke/Arizona State Procurement Office		PO Assigned:
Gov't Entity:	Arizona State Procurement Office		Pete Mahnke/Arizona State Procurement Office
Process Status:	Pending Procurement Plan	Status:	Complete

Once the requisition needs are understood (only necessary if you received from a customer), you may create your PP by Clicking on the Create Procurement Plan link.

ADDAA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Create Requisition
My Requisitions
All Requisitions
My Procurement Plans

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Procurement Plan
Requisition #ADSM-5QJUW6
Page loaded on 08/18/2003 at 04:03:58 PM.
• = Required Field

Document Information

Requisition #:	ADSM-5QJUW6	Solicitation #:	TBD	Contract #:	TBD
Created By:	Pete Mahnke/Arizona State Procurement Office	Date Created:	08/18/2003	Gov't Entity:	Arizona State Procurement Office
Requestor:	Pete Mahnke/Arizona State Procurement Office	Status:	PP: Pending	Status:	Draft
Requisition Title: How to Create a Requisition					

General Information

PO Assigned: Pete Mahnke/Arizona State Procurement Office
PM Assigned: Rex Martin/Arizona State Procurement
PA Assigned: Katherine Babonis/Arizona State

Note You can return to the requisition by clicking on its link

Created By, Requestor and Gov't Entity are links as well

ADDAA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer provided by ADDAA LAN

File Edit View Favorites Tools Help

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Create Requisition
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My Procurement Plans

Solicitations
Proposals
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Help
Change Password

Requisition #ADSM-5QJUW6
Procurement Plan view

General Information

PO Assigned: PO AtSPO/State Procurement Office
PM Assigned: PM AtSPO/State Procurement Office
PA Assigned: PA AtSPO/State Procurement Office

• Solicitation ☒ RFP ☐ IFB ☐ RFQ (Cost) ☐ RFQ
Type:
• Contract ☐ Agency ☐ Multi-Agency
Type: ☐ Statewide

Procurement Dates

Description (• = Modified)	Plan	Actual	Variance
Requisition Received:	11/30/2004	11/29/2004	0
• Solicitation Draft:			
• Customer Review:			
• Solicitation Issued:			
Solicitation		N/A	N/A
Conference:			

Location:

Note

The information available in the General Information section in the image on the previous page. None of these is a link

ADDA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer provided by ADDA LAN

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Requisitions
Create Requisition
My Requisitions
Open Requisitions
My Procurement Plans

Solicitations
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Other
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developed in partnership with
Help
Change Password

Requisition: Procurement Plan view
Title:

General Information
PO Assigned: PO AtSPO/State Procurement Office
PM Assigned: PM AtSPO/State Procurement Office
PA Assigned: PA AtSPO/State Procurement Office
Solicitation: ☒ RFP ☐ IFB ☐ RFQ (Cost) ☐ RFQ
Type:
Contract: ☐ Agency ☐ Multi-Agency
Type: ☐ Statewide

Procurement Dates

Description	Plan	Actual	Variance
Requisition Received:	11/30/2004	11/29/2004	0
Solicitation Draft:			
Customer Review:			
Solicitation Issued:			
Solicitation Conference:		N/A	N/A

Location:

Done Start Novell-delivered Applicati... ADDA: SPIRIT - Autom... 9:51 AM

It is in the PP that you select the type of solicitation you will do for this procurement.

Select the radio button for the appropriate procurement type (Solicitation Type).

You are all familiar with an RFP and IFB. However, the Spirit system has the RFQ set up in two different ways. They are:

RFQ (Cost): which is the process they tend to follow the majority of the time; based primarily on cost.

RFQ: follows more in line with an RFP and allows for evaluation.

The selection of either will depend upon the needs of the particular procurement. In many, if not all instances, you will not be using RFQ –Cs or RFQs as SPIRIT will be used by you primarily for Statewide contracts.

Beneath the Solicitation Type is the Contract Type section. Again, you will primarily be selecting Statewide.

NOTE: Once the Procurement Plan is completed and published (not publicly published/viewable), you will not be able to change the Solicitation or Contract Type. Canceling the procurement will be necessary and you will need to create a new requisition.

In the actions that follow, note that the Date drop down menu configuration changes depending upon the procurement type selected.

Procurement Dates

Description (= Modified)	Plan	Actual	Variance
Requisition Received:	08/18/2003	08/18/2003	0
• Solicitation Draft:	<input type="text"/>		
• Customer Review:	<input type="text"/>		
• Solicitation Issued:	<input type="text"/>		
Solicitation Conference:	<input type="text"/> AM	N/A	N/A
Location:	<input type="text"/>		
• Amendment Issued:	<input type="text"/>		
• Solicitation Due:	<input type="text"/>		
• Evaluation Form Due:	<input type="text"/>		
• Evaluation Meeting:	<input type="text"/>	N/A	N/A
• Clarifications:	<input type="text"/>	N/A	N/A
• Clarifications Due:	<input type="text"/>	N/A	N/A
• Presentation:	<input type="text"/>	N/A	N/A
• BAFO Due:	<input type="text"/>		
• Award:	<input type="text"/>		

Dates are selected by using the drop down menus

Take a moment to note the key dates that must be selected for the RFP. The PP also loads these date fields as mandatory for an RFQ

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Procurement Dates

Solicitation Type: ☒ RFP ☐ IFB ☐ RFQ (Cost) ☐ RFQ

Description (= Modified)	Plan	Actual	Variance
Requisition Received:	08/18/2003	08/18/2003	0
Solicitation Draft:			
Customer Review:			
Solicitation Issued:			
Solicitation Conference:		N/A	N/A
Amendment Issued:			
Solicitation Due:			
Evaluation Form Due:			
Evaluation Meeting:		N/A	N/A
Award:			

Location:

Comments

Take a moment to note the key dates that must be selected for the IFB. The PP also loads these date fields as mandatory for an RFQ C.

Procurement Dates			
Description (= Modified)	Plan	Actual	Variance

The Plan date is that which you hope to meet.

Actual Date is captured by the Spirit system.

The Variance is then calculated and loaded into the appropriate column.

Solicitation Conference:	-	-	-	N/A	N/A
	-	-	○ AM		
			○ PM		
Location:					

Further down in the Plan is a date area to assign the Pre-Proposal or Pre-Bid conference. Select the date as you do the others. A time and location field is also available for the meeting. If you do not enter this information in the Procurement Plan, you will be able to in the solicitation draft.

Note Comment fields. These can be used for communication between the Customer and the PO to note any changes or concerns that arise from any dates chosen.

There are two Comment fields for the PO. One that is public and is viewable by all. The other that is viewable internally only, which excludes the Customer.

Save as: ☒ Draft ☐ Submit to Customer for Approval

Submit


Reset


Note Save as: options. While drafting the PP you may stop and Submit at any time when Draft is selected. You may then return at another time to continue your work.

Submit to Customer for Approval does just what it implies. When you are ready to send it to the Customer for their review/approval, you select the appropriate radio button for that process.

What this does is changes the status of the PP to Pending Customer Approval. As you will more likely than not, be the customer as well, return to PP, click on the edit icon, scroll to the bottom and select Submit to PO for Approval and click on the submit button.

When you have selected all the mandatory dates, change the Save as status to Submit to Customer for Approval.

Return to the PP by clicking on the PP number link, once in the PP click on the edit icon , scroll to the bottom of the document and change the Save as: to Submit to PO for Approval and click on the submit button.

When you return to the PP after the above submittal description, click on the edit icon , then scroll to the bottom of the document again. In this instance you will be selecting the Publish status and submitting it.

Save as: ☐ Update ☐ Submit to Customer for Approval ☒ Publish

That basically covers the Procurement Plan in a nutshell.

Regardless of whether or not you create the requisition or a customer creates it, a Procurement Plan will be necessary.




The approval process flows from PO to Customer and back to PO. Note that you will not be able to change any dates in the PP once it is published, however, you may return to make notes regarding the procurement and save those though.

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Automated eProcurement System

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Requisitions

Create Requisition

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All Requisitions

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My Procurement Plans

By Requisition Number

Page loaded on 08/18/2003 at 04:05:27 PM.

Req Num	Sol Num	Type	Title	Status	PO	Requestor
ADSM-5QJLW6	TBD	RFP	How to Create a Requisition	Draft	Pete Mahnke	Pete Mahnke/Arizona State Procurement Office
ADSM-5QJRP4	AD040055	RFP	STRESS TEST RFP	Complete	Pete Mahnke	Greg Dwight
ADSM-5QJRNJ	AD040056	RFP	Stress Test Training Session 2 RFP 2 Practice	Complete	Pete Mahnke	Greg Dwight
ADSM-5QJRMW	AD040057	RFP	Stress Test Training Session 2 RFP 1	Complete	Pete Mahnke	Greg Dwight
			Stress Test			

Done

Start Novell-delivered Applicati... ADDA: SPIRIT - Autom...

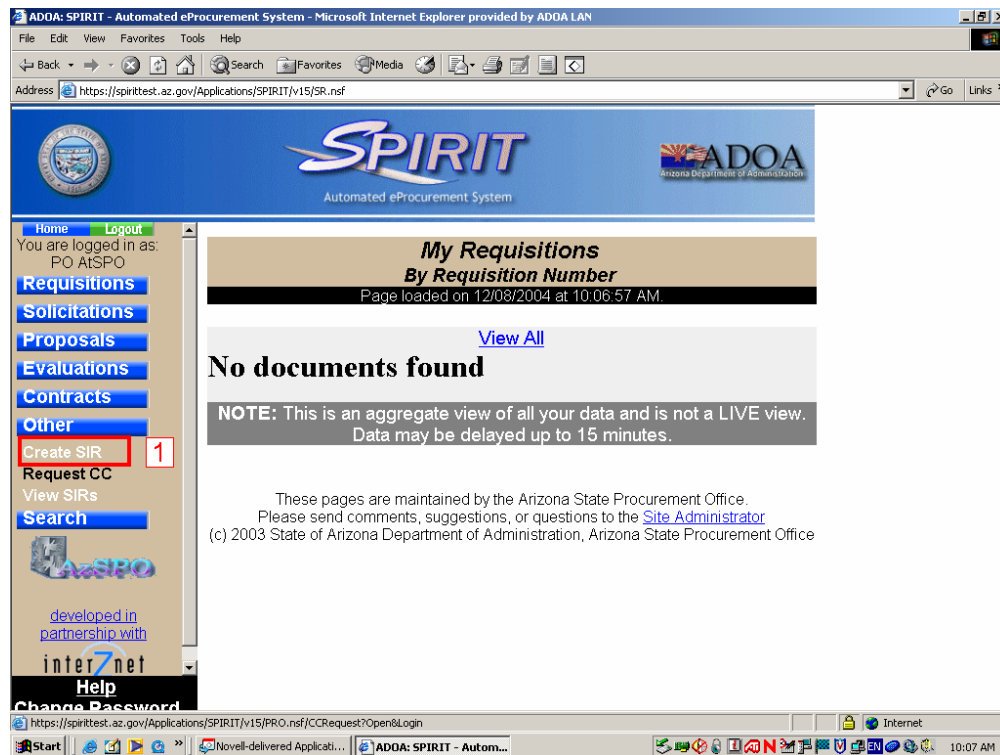
Internet [Click to stop the capture] 8:11 PM

Supplier Information Request

The Supplier Information Request or SIR (previously known as an RFI), within the Spirit system allows users to query the supplier community as a possible prerequisite to a solicitation regarding whether a service or commodity is out there and to what kind of response we might expect to a solicitation.

This material takes you through the steps to creating and publishing the Supplier Information Request.

After logging in to the Spirit system Click on the **Other** tab from the Navigation menu



Note


- 1 You may Create a SIR by Clicking on the **Create SIR** tab
OR
- 2 You may View a Sir that you may have already created and published by Clicking on the **View SIRs** tab

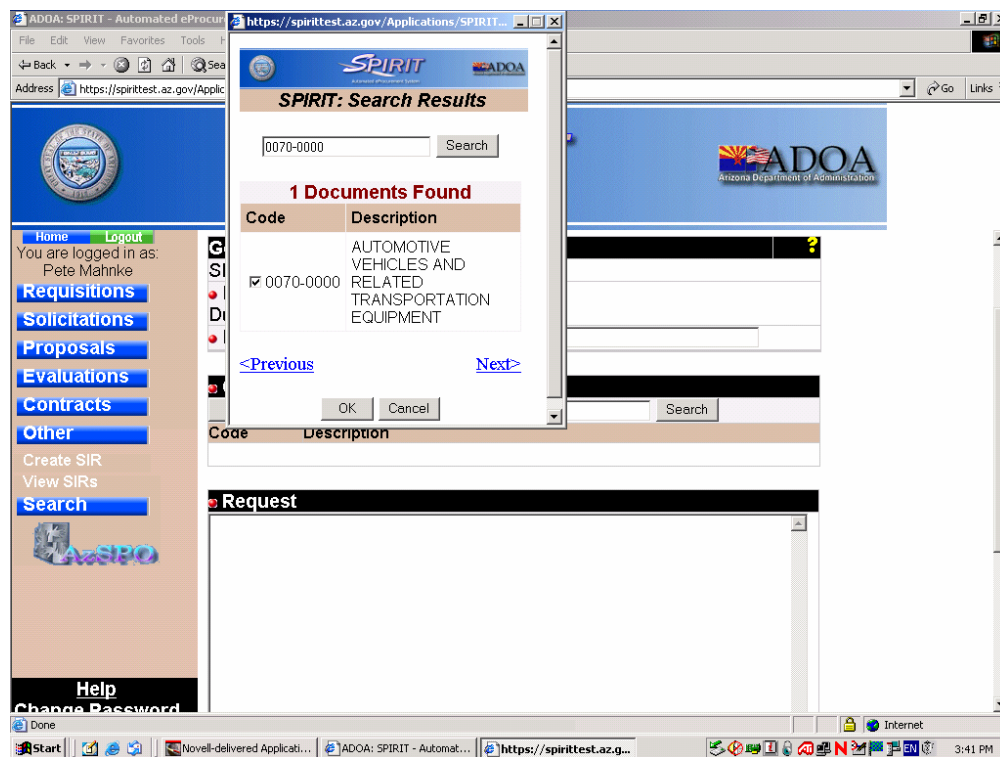
When you create a SIR in the Spirit system and publish it or Submit to Supplier the work within the Spirit system is done. The supplier community (assigned by commodity/service code) receives an e-mail formatted with the information you requested.

It is the responsibility of the supplier to respond back to you outside the Spirit system either via e-mail, fax or US mail dependent upon your instruction.

Click on the **Create SIR** tab

There is no attachment functionality in the Supplier Information Request portion of Spirit.

- 1 The Spirit system automatically assigns a number to the SIR
- 2 It also requires a supplier to respond by a certain date, which is selectable from the Due Date drop down menu by clicking on the  drop down arrow.
- 3 Enter a title for the information request here. For further detail you will use the Request window.
- 4 Enter the Commodity/Service Code appropriate to the request and Click on the The Request Section allows for the typing in of the request itself



The search results screen opens

Click in the checkmark box ☒ to the left of the Code listed, Click on the button

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

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Help
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New Supplier Information Request
Supplier Information Request
Page loaded on 08/14/2003 at 03:36:38 PM

General Information

SIR Number: AD5M-5QEUK
Date Request: 8/15/2003
Due:
Description: The SPO needs info on...

Commodity Codes

Add Remove 0070-0000 Search

Code Description

0070-0000 - AUTOMOTIVE VEHICLES AND RELATED TRANSPORTATION EQUIPMENT

Request

(2 items remaining) Downloading picture https://spiritest.az.gov/Applications/SPIRIT/PRO.nsf/Required.gif?OpenImageResource...

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom...

Internet 3:41 PM

The code selected is now listed. You may enter further codes as is necessary.

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Home Logout
You are logged in as:
Pe

Req Place a checkmark
Sol in the box to
Pro the code(s)
Eva left and
Con click OK
Oth
Create SIR
View SIRs
Search

Help
Change Password

General Information

SIR Number:
Date Request:
Description:

Commodity Codes

Add Remove

Code Description

0070-0000 - AUTOMOTIVE VEHICLES AND RELATED TRANSPORTATION EQUIPMENT

Request

SPIRIT: Remove Commodity Codes

-----Please select the Codes you would like to remove-----

Code Description

☒ 0070-0000 - AUTOMOTIVE VEHICLES AND RELATED TRANSPORTATION EQUIPMENT

OK Cancel

Done

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom...

Internet 3:42 PM

NOTE

If you selected any code(s) that you do not need Click on the Remove button

The Remove Commodity Code window will open with the code(s) you added listed.

Select the code(s) to remove by placing a checkmark in the box ☐ to its left then Click the button

See screen shot on previous page

Type in the detail of the request in the request window. The text will wrap as needed so do not be concerned about running out of space

When you have completed the Request click on the button at the bottom of the screen, this will send the Request the Supplier community or Click on the button to reset the Request language and restart.

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

Address: <https://spirittest.az.gov/Applications/SPIRIT/SR.nsf>

SIRs
By Description
Page loaded on 08/14/2003 at 03:38:02 PM.

Search

Description	Commodity Codes	Request
0070-0000	0070-0000	Did you get this?
0070-0020	0070-0020	How 'bout this 'un? We need replacement parts for something and I need to find out if you have replacement parts for something. Are somethings

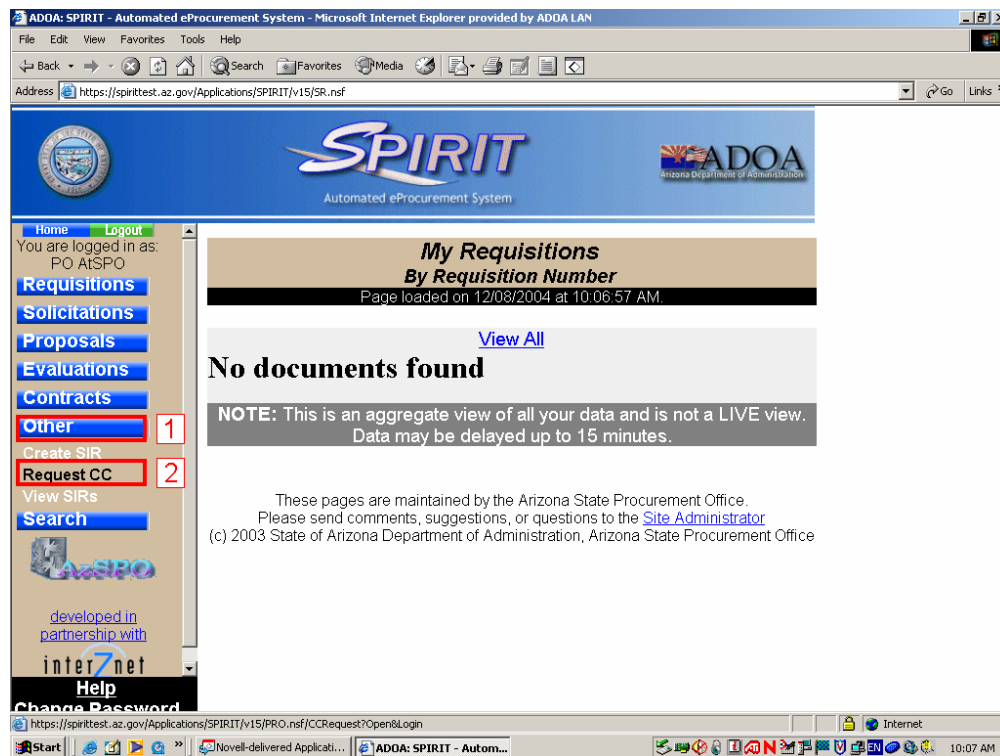
Help
Change Password

Start | Novell-delivered Applicati... | ADOA: SPIRIT - Autom... | 3:43 PM

Creating a COMMODITY CODE ITEM request

- This section covers creating a Commodity Code Item or CCI.
- At the solicitation and contract level the eight digit commodity code is further defined down to a more definitive product or service. For instance; if 0620-0085 is "Pen and Pencil Sets," and you have a need for yellow number two pencils. You would then create a CCI request for 0620-0085-0001, with -0001 being "pencil, number 2, yellow."
- The requested CCI routes to the SPIRIT Administrator for final completion or approval. This is necessary to avoid any duplicate CCI numbers or descriptions from being created.
- The process of creating a CCI request may only take you a minute or less to do, however, the CCI will not be available for use for up to 45 minutes after the SPIRIT Administrator accepts it. This is due to the new CCI needing to cycle through the server and its databases before it is available.

NOTE: requisition Line Items are not defined down to the CCI level, though you may want to submit your request(s) early in the process so they are available when needed.



Using the Navigation Menu to the left, click on the **Other** button (1). From the sub-menu that opens beneath it, click on the **Request CC** button (2).

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Other

Create SIR
Request CC
View SIRs
Search

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Help
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Request Number:	ADSM-67GN4B	Date Requested:	12/08/2004 10:07 AM
Requested By:	PO AtSPO/State Procurement Office	Status:	New

Request Notes
Notes: 1 None

Commodity Code Information
Commodity Code: 2 0070 Commodity Class: 3 0018 Commodity Item: 4 0023

Commodity Code Description Information
Description: 5 example.
Definition:

Submit Reset

These pages are maintained by the Arizona State Procurement Office.

A CCI request form will be generated.

- 1) Request Notes – this field is not mandatory, however, you can use it as a means of communication with the SPIRIT Administrator with regard to the request.
- 2) Commodity Code – commodity code number you are using
- 3) Commodity Class: commodity class you are using
- 4) Commodity Item: number you would like assigned as the Item number (if available).
- 5) Description: Item description. Note that this Item Description should not include any verbiage already included in SPIRIT. Example: 0620-0085 is “Pen and Pencil Sets,” you should not include this as it is already defined. You are requesting further definition to the Item level, -0001 “**pencil, number 2, yellow.**”

Note: the **Definition** field is only used for services taxonomy.

Notes are not required, so you may leave this field blank if you wish.

Simply fill out the other fields as depicted in the previous image and click on the

Submit

If after submitting the request you would like to change the description, contact the SPIRIT Administrator as soon as possible. If, however, the Administrator has already accepted the CCI as submitted and the 45 minute cycle has not completed, it will be necessary for the Administrator to wait the time out. At that point, any wording changes you would like can be made by the Administrator. This wording change will be immediate and no server cycle time wait will be necessary.

This covers Commodity Code Item requests. This functionality is also available to support staff, so if you wish, you can have one of the staff submit the request for you while you work on other portions of your solicitation draft.

Solicitation Drafting (RFP)

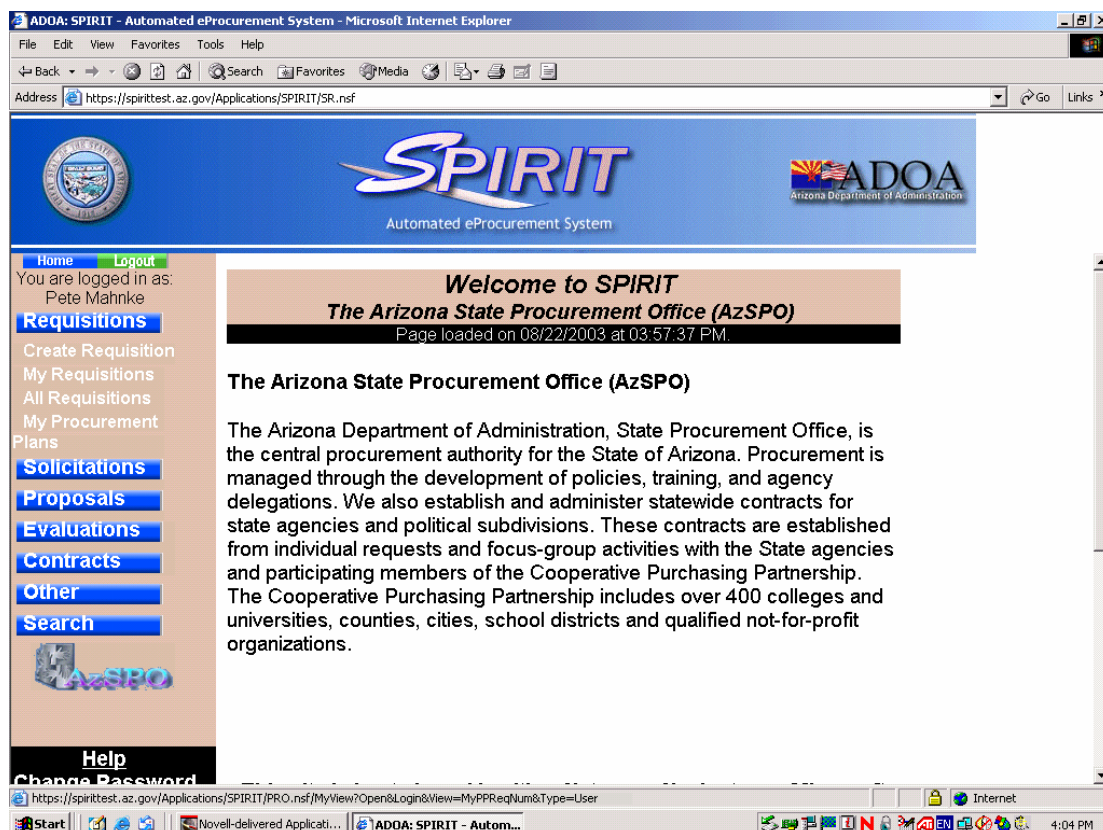
- Background Information** Essential background information on this topic includes the following:
- In order to create a solicitation
 - You must have received or created a requisition
 - You must then have created a Procurement Plan (PP) and published it for the requisition.
 - All the familiar rules and procedures of procurement are followed in the Spirit System, so you are not learning anything new there.

This portion of the manual begins the process of creating a solicitation. For the purposes of this manual an RFP will be created. Other solicitation types will be covered however, they may only cover any differences as the process of construction is much the same, regardless of the type.

The Procurement Officer or PO, having received a requisition, then goes on to create a Procurement Plan or PP. Once the PO has drafted the PP, he or she submits it to the requisitioning customer for approval. Once agreement has been met and the customer submits the PP back to the PO; the PO then receives an e-mail notifying them of its approval. The notification e-mail contains a link to Spirit, which if clicked on will bring them to the Spirit site log in screen. Were the PO to login, they were be brought directly to the document in question.

For the purposes of this manual, we will access the PP as one would normally enter Spirit.

The PO must return to the PP to publish the document thereby locking in dates, with the exception of those you are able to change from the solicitation document itself, more on that later in the manual. Once the PP has been published, the PO can then go about creating the solicitation draft.



In order to create a solicitation, you must return to the published Procurement Plan.

Click on the **Requisitions** tab. Click on the **My Procurement** Plans tab from the submenu that opens under Requisitions.

Once at the My Procurement Plan by Requisition Number screen, click on the link for the appropriate document.

Procurement Plan
Requisition #ADSM-5QNUQB
Complete
 Page loaded on 08/22/2003 at 03:59:23 PM.

Document Information

Requisition #:	ADSM-5QNUQB	Solicitation #:	TBD	Contract #:	TBD
Created By:	Pete Mahnke/Arizona State Procurement Office	Date Created:	08/22/2003	Gov't Entity:	Arizona State Procurement Office
Requestor:	Pete Mahnke/Arizona State Procurement Office	Status:	Complete		
Process Status:	Solicitation: Pending				
Requisition Title:	Solicitation Creation				

General Information

PO Assigned: Pete Mahnke/Arizona State Procurement Office
 PM Assigned: Rex Martin/Arizona PA Assigned: Katherine

At the top center of your Procurement Plan will be the [Create Solicitation](#) link, Click on it.

SPIRIT: Choose Default Solicitation Type

Please select the Default Solicitation type.

Type

- ☒ Default
- ☐ Existing Solicitation
- ☐ Existing Contract

Next Cancel

The next option that becomes available is the Default Solicitation type. See image on previous page.

If you select Default, a new draft solicitation will be generated, allowing you to start from scratch.

Existing Solicitation creates a copy of a previously created solicitation that you may want to use because of its similarity to the new procurement you are doing.

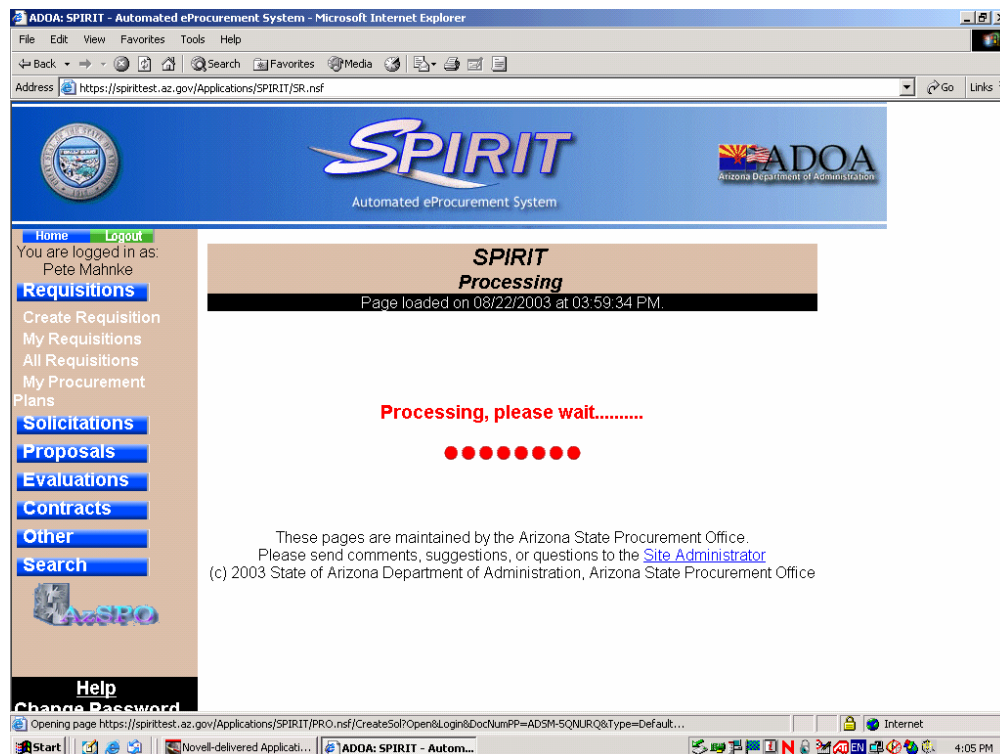
Existing Contract does the same thing as the existing solicitation; however, a copy of a contract is created.

Selecting either the Existing Solicitation or Contract will load another window with a listing of all solicitations or contracts of the type you are creating. You would then click in the area to the left of the document you would like to copy and click OK

Note: when using the Existing Solicitation or Contract functionality it is only possible to copy a solicitation or contract of the same type. Only RFPs will be selectable if you are doing an RFP and only IFBs will be available if you are doing an IFB.

For the purpose of the manual, we will use the Default selection.

After selecting Default, Click on the  button



It may take a few moments for Spirit to create the draft

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You are logged in as:
Pete Mahnke

Requisitions
Create Requisition
My Requisitions
All Requisitions
My Procurement Plans

Solicitations
Proposals
Evaluations
Contracts
Other
Search

Help
Change Password

Solicitation Creation
Solicitation #AD040061
Draft
Page loaded on 08/22/2003 at 03:59:58 PM.
• = Required Field

Document Information			
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061
Amendment:	No	Amend. #:	0
Created By:	Pete Mahnke/Arizona State Procurement Office	Date Created:	08/22/2003
Requestor:	Pete Mahnke/Arizona State Procurement Office	Gov't Entity:	Arizona State Procurement Office
Process Status:	Solicitation: Draft	Status:	Draft
Date Published:		Close Date:	09/01/2003
		Type:	RFP

Solicitation Information
PO Assigned: Pete Mahnke/Arizona State Procurement Office

The solicitation draft opens up. Note its similarity to other documents we have dealt with. Most, if not all documents in the Spirit System contain links allowing you to go directly to contact info or to another document tied to the document you are presently in.

Note that the close date has loaded into the solicitation from the PP.

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Help
Change Password

Solicitation Information

PO Assigned: Pete Mahnke/Arizona State Procurement Office

PM Assigned: Rex Martin/Arizona State Procurement Office

PA Assigned: Katherine Babonis/Arizona State Procurement Office

• Priority Solicitation: No

• Contract Type: Agency Statewide

• Include Questionnaire? Solicitation Creation

• Review by Date: 9/1/2003

• Date To Close: 9/1/2003

• Yes No

Title: Conference State Procurement Office

Location: Office

Conference Date: 09/01/2003 10:00 AM

• Procurement Officer Conflict of Interest Acknowledge

(View):

• Description:

Note the PO, PM and further to the right, the PA assigned to the solicitation.

Priority Solicitation is a functionality available to the PM and PA. This allows either of them to set a particular solicitation as priority. Hot potato procurements may need to be set as priority. If Priority is selected, only the PM or PA has the right to publish the solicitation.

Review by date and date to close loaded from the PP. These are changeable in the solicitation by using their drop down menus.


The Date To Close may be necessary if the procurement is running a little behind schedule. You may need to adjust the date to allow the solicitation to be available for the proper amount of time.


If you wish to include a questionnaire in the solicitation you can select the Yes radio button. Default setting is No.

The Solicitation title loads from the requisition. You may change it if necessary.

The conference location, its date and time loaded from the PP or you may enter the information if you did not at the Procurement Plan.

The POs Conflict of Interest form is included electronically in the Spirit System.

To read the Conflict of Interest form Click on the ([View](#)) link. The Conflict document will open in a separate window, which will allow you to read or print the document. Click on  After reading the form to close it.

Click within the checkbox  to acknowledge or sign. A solicitation will not be publishable if not acknowledged. SPIRIT will let you know when you try to publish your solicitation if you have not acknowledged the statement.

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Include Questionnaire? ☒ Yes ☐ No

Solicitation
Title: Solicitation Creation

Conference: State Procurement
Location: Office
Date: 09/01/2003 10:00 AM

Procurement Officer Conflict of Interest ☒ Acknowledge

Description:
Solicitation creation

Clauses

Section	Clause	
-Select-	-Select Section-	Add
-Select-	-Select-	
-Select-	-Select Section-	Remove

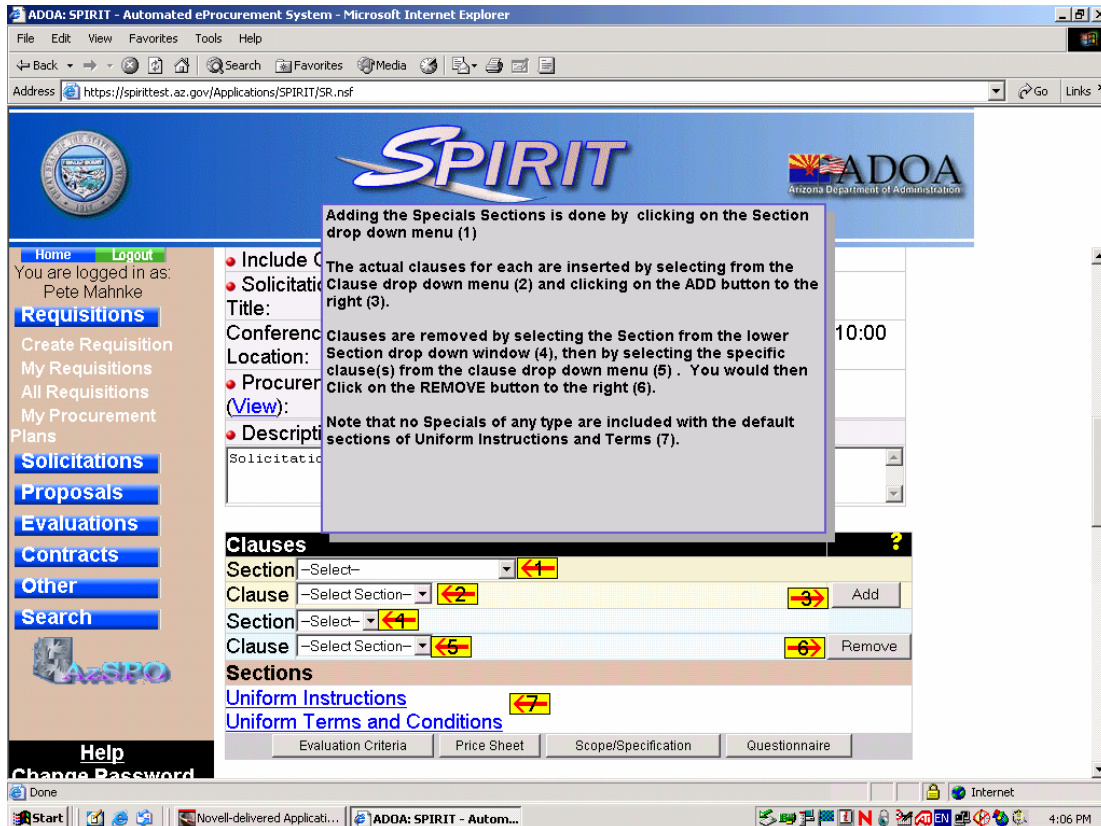
Sections
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

[Evaluation Criteria](#) [Price Sheet](#) [Scope/Specification](#) [Questionnaire](#)

Type a description for the solicitation. This will allow others a better idea of what it is for. It will also be recorded as search criteria allowing for the ease of locating documents by users.

Special Instructions & Special Terms and Conditions

The next step covered will demonstrate adding Special Instructions and Special Terms and Conditions.



Adding the Specials Sections is done by clicking on the Section drop down menu (1)

The actual clauses for each are inserted by selecting from the Clause drop down menu (2) and clicking on the ADD button to the right (3).

Clauses are removed by selecting the Section from the lower Section drop down window (4), then by selecting the specific clause(s) from the clause drop down menu (5). You would then Click on the REMOVE button to the right (6).

(7) Previously described the fact that no Specials links were present initially, this is no longer the case. Please disregard.

Click on the Section drop down menu and select Special Instructions

Note that the screen shifted a bit and that the Clause drop down menu has gotten longer. When Special Instructions was selected, Spirit loaded all the special instruction clauses appropriate to the solicitation.

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Section Special Instructions

Clause -Select-

Section -Select-

Clause Bid Bond

Section Brand Name Only
Catalog Pricing
Catalog/Price List Discounts
Current Product (Software)
Current Products
Dealer Network Qualifications
Dealer Network/Maintenance Facility Coverage
Dealer Participation Letters

Price Sheet Information
• Tabulation • By Line Items • By Group • By Whole Set
Grouping:
• Instructions:

Suggested Suppliers
Add Remove Search View Suppliers

Comments:

The next step is to select a clause from the drop down menu. Bid Bond is going to be selected in this manual.

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Section Special Instructions

Clause Bid Bond

Section -Select-

Clause -Select Section-

Sections
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

Evaluation Criteria Price Sheet Scope/Specification Questionnaire

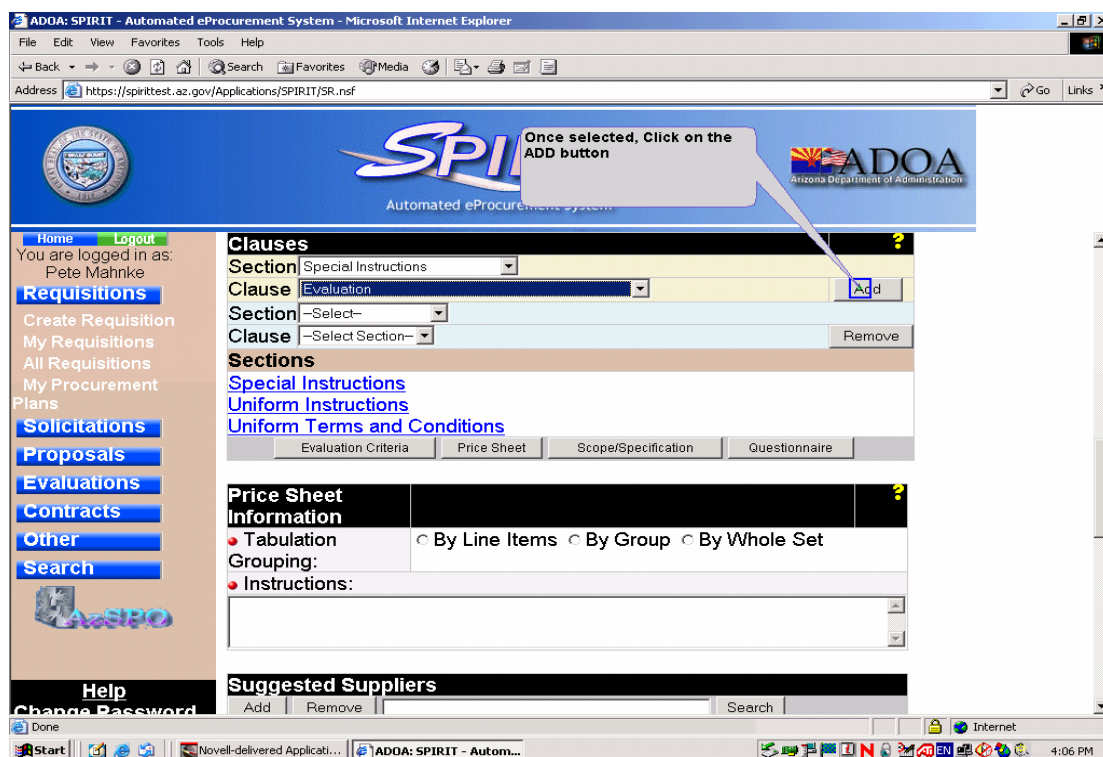
Price Sheet Information
• Tabulation • By Line Items • By Group • By Whole Set
Grouping:
• Instructions:

Suggested Suppliers
Add Remove Search View Suppliers

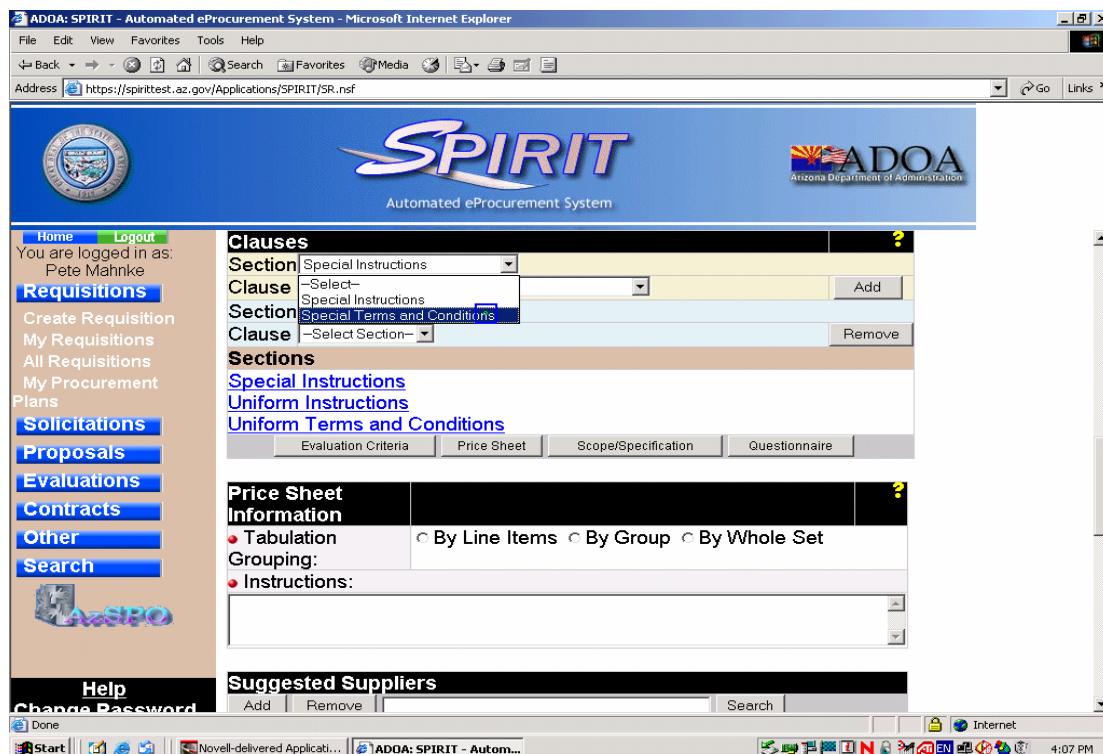
Comments:

To include the clause Click on the ADD button.

To include the clause Click on the **Add** button.



The manual will now click on the Clause drop down and select Evaluation. Once Evaluation is selected, Click on the **Add** button



Special Terms and Conditions is added the same way

When you select Special Terms and Conditions from the Section drop down, the Special Terms and Conditions will load into the Clause drop down menu. You then follow the same procedure as with the Instructions

As with the Special Instructions, once you have added a clause, the Special Terms and Conditions section will appear beneath Special Instructions. See image above

Note that the Insurance Clause must be selected in order for the Spirit System to include the insurance form with the solicitation.

The preceding were the steps necessary for adding Special Instructions & Special Terms and Conditions and their clauses. The next section covered will address the steps taken to edit the clauses included.

Clause editing

You may notice that a few additional clauses have been added in the interim.

As you may have noticed, these Section titles are links. To view or edit any clause included with the exception of Uniforms (they can only be viewed), you click on the Section link. A window opens listing the clauses included. To view a particular clause you click on its link.

Click on Special Terms and Conditions

This list of included clauses opens. Note the blue dot to the left of Performance Bond. The blue dot alerts the user to the fact that the clause language has been edited.

Also note the Column Titles: CL# is the clause number and pertains to the Uniforms so that they display in the appropriate order, this column is not used with the Specials. Type denotes whether a clause is O for optional or M for mandatory (Uniforms). Edit. denotes whether a clause is editable or not.

CL #	Clause Name	Type	Edit.
	Contract Extension	O	Yes
	Eligible Agencies (Listed)	O	Yes
	Insurance	O	Yes
	Performance Bond	O	Yes

Close

[Special Instructions](#)
[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

[Evaluation Criteria](#)
[Price Sheet](#)
[Scope/Specification](#)
[Questionnaire](#)

Certificate of Insurance Information

<ul style="list-style-type: none"> Bodily Injury: -Select- Per Person: -Select- Each: -Select- Occurance: -Select- Property Damage: -Select- Statutory: -Select- 	-OR-	<ul style="list-style-type: none"> Bodily Injury: -Select- --And--: -Select- Property Damage: -Select- Combined: -Select-
--	------	---

Help
Change Password

javascript:viewClauses('ADO40061~Special+Terms+and+Conditions', 'Yes', 'No')

Start | Novell-delivered Applicati... | ADOA: SPIRIT - Automat... | SPIRIT: Solicitation CL... | Internet | 4:11 PM

This list of included clauses opens. Note the blue dot to the left of Performance Bond. The blue dot alerts the user to the fact that the clause language has been edited.

Also note the Column Titles: CL# is the clause number and pertains to the Uniforms so that they display in the appropriate order, this column is not used with the Specials. Type denotes whether a clause is O for optional or M for mandatory (Uniforms). Edit denotes whether a clause is editable or not.

Solicitation Clauses
Special Terms and Conditions
Solicitation # AD040061
 Page loaded on 08/22/2003 at 04:05:16 PM.

CL #	Clause Name	Type	Edit.
	Contract Extension	<input type="radio"/>	Yes
	Eligible Agencies (Listed)	<input type="radio"/>	Yes
	Insurance	<input type="radio"/>	Yes
	Performance Bond	<input type="radio"/>	Yes

Close

[Special Instructions](#)
[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

Evaluation Criteria Price Sheet Scope/Specification Questionnaire

Certificate of Insurance Information

<ul style="list-style-type: none"> Bodily Injury: <input type="text" value="-Select-"/> Per Person: <input type="text" value="-Select-"/> Each: <input type="text" value="-Select-"/> Occurance: <input type="text" value="-Select-"/> Property Damage: <input type="text" value="-Select-"/> Statutory: <input type="text" value="-Select-"/> 	-OR-	<ul style="list-style-type: none"> Bodily Injury: <input type="text" value="-Select-"/> --And--: <input type="text" value="-Select-"/> Property Damage: <input type="text" value="-Select-"/> Combined: <input type="text" value="-Select-"/>
--	------	---

Click on Eligible Agencies (Listed).

Solicitation Clause
Special Terms and Conditions
Solicitation # AD040061
 Page loaded on 08/22/2003 at 04:05:19 PM.

Eligible Agencies (Listed)
 Default

Any contract resulting from this solicitation shall be for the exclusive use of the State of Arizona agency designated.

Proposed Wording:
 Any contract resulting from this solicitation shall be for the exclusive use of the State of Arizona agency designated.

Make Changes:

[Special Instructions](#)
[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

Evaluation Criteria Price Sheet Scope/Specification Questionnaire

Certificate of Insurance Information

<ul style="list-style-type: none"> Bodily Injury: <input type="text" value="-Select-"/> Per Person: <input type="text" value="-Select-"/> Each: <input type="text" value="-Select-"/> Occurance: <input type="text" value="-Select-"/> Property Damage: <input type="text" value="-Select-"/> Statutory: <input type="text" value="-Select-"/> 	-OR-	<ul style="list-style-type: none"> Bodily Injury: <input type="text" value="-Select-"/> --And--: <input type="text" value="-Select-"/> Property Damage: <input type="text" value="-Select-"/> Combined: <input type="text" value="-Select-"/>
--	------	---

Note the information contained in the heading

ADOA: SPIRIT - Automated eProcurement

SPIRIT: Solicitation Clause - Microsoft Internet Explorer

Eligible Agencies (Listed)

Default

Any contract resulting from this solicitation shall be for the exclusive use of the State of Arizona agency designated.

Proposed Wording:

Any contract resulting from this solicitation shall be for the exclusive use of the State of Arizona agency designated.

Make Changes:

The clause title is included.

The default language is listed. Notice that the Proposed Wording is the same as the default. This wording will not change unless you edit the clause. You will then have both available for comparison

[Special Instructions](#)
[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

[Evaluation Criteria](#) [Price Sheet](#) [Scope/Specification](#) [Questionnaire](#)

Certificate of Insurance Information

• Bodily Injury: -Select-	-OR-	• Bodily Injury: -Select-
• Per Person: -Select-		• --And--: -Select-
• Each -Select-		• Property Damage: -Select-
• Occurance: -Select-		• Combined: -Select-
• Property Damage: -Select-		
• Statutory Liability: -Select-		

Help
[Change Password](#)

javascript:viewClauses('ADO40061~Special+Terms+and+Conditions', 'Yes', 'No')

Start | Novell-delivered Applicati... | ADOA: SPIRIT - Automat... | SPIRIT: Solicitation CL... | Internet | 4:11 PM

The clause title is included.

The default language is listed. Notice that the Proposed Wording is the same as the default. This wording will not change unless you edit the clause. You will then have both available for comparison

Eligible Agencies (Listed)

Default
Any contract resulting from this solicitation shall be for the exclusive use of the State of Arizona agency designated.

Proposed Wording:
Any contract resulting from this solicitation shall be for the exclusive use of the State of Arizona agency designated.

Make Changes:
Change Proposed

History of Changes:

Certificate of Insurance Information

Bodily Injury: -Select-	-OR-	Bodily Injury: -Select-
Per Person: -Select-		--And--: -Select-
Each: -Select-		Property Damage: -Select-
Occurrence: -Select-		Combined: -Select-
Property Damage: -Select-		
Statutory: -Select-		

Special Instructions
[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

Evaluation Criteria
[Evaluation Criteria](#) | [Price Sheet](#) | [Scope/Specification](#) | [Questionnaire](#)

This area beneath the Change Proposed button is where the user does their editing. To load the default language into the edit area, click on the **Change Proposed** button.

The default language is now in the edit window. Make any changes necessary.

Change Proposed

Any contract resulting from this solicitation shall be for the exclusive use of the State of Arizona agency designated. The state procurement office.

History of Changes:

Submit **Cancel** **Reset**

If you click on the Reset button it will erase the change you just made, but only before you have submitted it.

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Please send comments, suggestions, or questions to the [Site Administrator](#)
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Certificate of Insurance Information

Bodily Injury: -Select-	-OR-	Bodily Injury: -Select-
Per Person: -Select-		--And--: -Select-
Each: -Select-		Property Damage: -Select-
Occurrence: -Select-		Combined: -Select-
Property Damage: -Select-		
Statutory: -Select-		

Special Instructions
[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

Evaluation Criteria
[Evaluation Criteria](#) | [Price Sheet](#) | [Scope/Specification](#) | [Questionnaire](#)

Before we submit this, note the History of Changes (image previous page). The area beneath will contain who, when and what was changed. We will return to this with a screen shot after submitting the change. Prior to that there is no history.

If you click on the Reset button it will erase the change you just made, but only before you

have submitted it. To save the changes made to the clause click on the **Submit** button.

Solicitation Clauses
Note the blue dot is now present as the clause has been edited.

CL #	Clause Name	Type	Edit
	Contract Extension	O	Yes
	Eligible Agencies (Listed)	O	Yes
	Insurance	O	Yes
	Performance Bond	O	Yes

[Close](#)

[Special Instructions](#)
[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

[Evaluation Criteria](#) [Price Sheet](#) [Scope/Specification](#) [Questionnaire](#)

Certificate of Insurance Information

• Bodily Injury: <input type="text" value="-Select-"/>	-OR-	• Bodily Injury: <input type="text" value="-Select-"/>
• Per Person: <input type="text" value="-Select-"/>		• --And--: <input type="text" value="-Select-"/>
• Each Occurance: <input type="text" value="-Select-"/>		• Property Damage: <input type="text" value="-Select-"/>
• Property Damage: <input type="text" value="-Select-"/>		• Combined: <input type="text" value="-Select-"/>
• Statutory: <input type="text" value="-Select-"/>		

Note in the previous image, the blue dot is now present as the clause has been edited.

History of Changes:
[Pete Mahnke/Arizona State Procurement Office - 08/27/2003 02:32:51 PM]
Any contract resulting from this solicitation shall be for the exclusive use of the State of Arizona agency designated. The State Procurement Office.
=====Default=====
Any contract resulting from this solicitation shall be for the exclusive use of the State of Arizona agency designated.
Submit Cancel Reset

Note that the person that made the last change is listed, also the date and time they made the change. The clause as it is now written and the default, which is how it was before. Had a customer made this change it would have listed them. The last change is always listed on top. You will get another view of this during the solicitation approval stage.

Certificate of Insurance Information

Bodily Injury: -Select-	-OR-	Bodily Injury: -Select-
Per Person: -Select-		--And--: -Select-
Each Occurance: -Select-		Property Damage: -Select-
Property Damage: -Select-		Combined: -Select-
Statutory: -Select-		

Clicking on the clause again will open it. Once opened, scroll to the bottom to view the History.

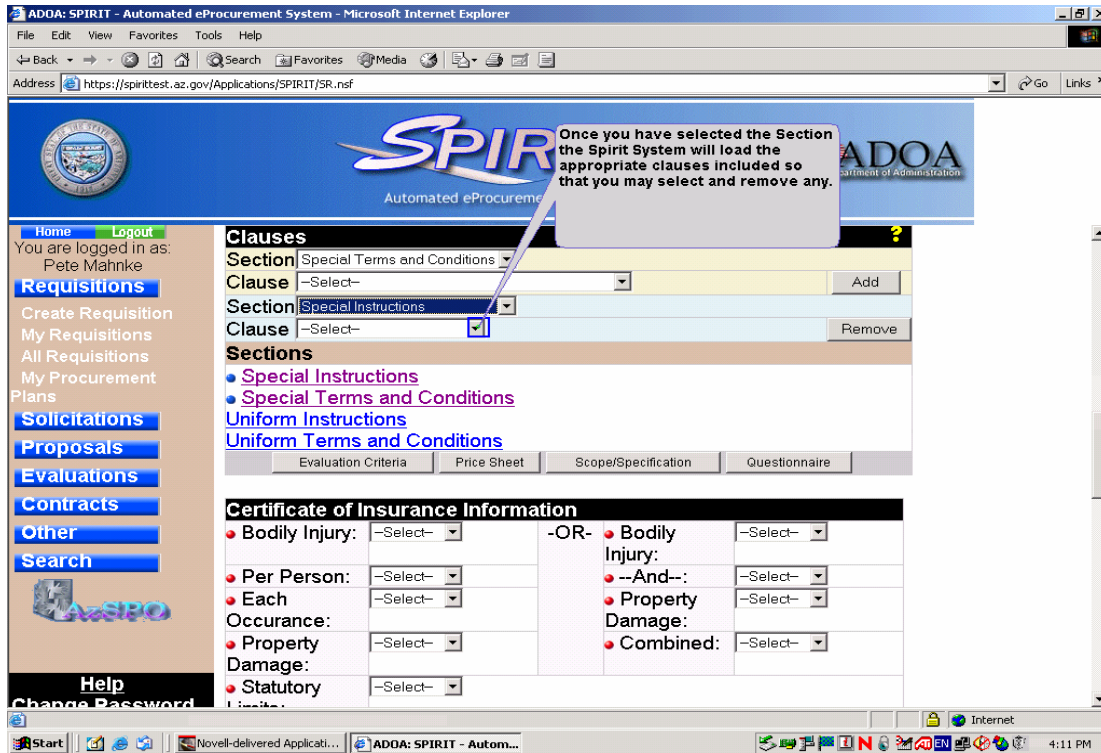
Note that the person that made the last change is listed; also the date and time they made the change. The clause as it is now written and the default, which is how it was before.

Had a customer made this change it would have listed them. The last change is always listed on top. You will get another view of this during the solicitation approval stage.

Click on the Submit or Cancel button to return to previous screen that lists the clauses you included. Then click on Close to return to the solicitation

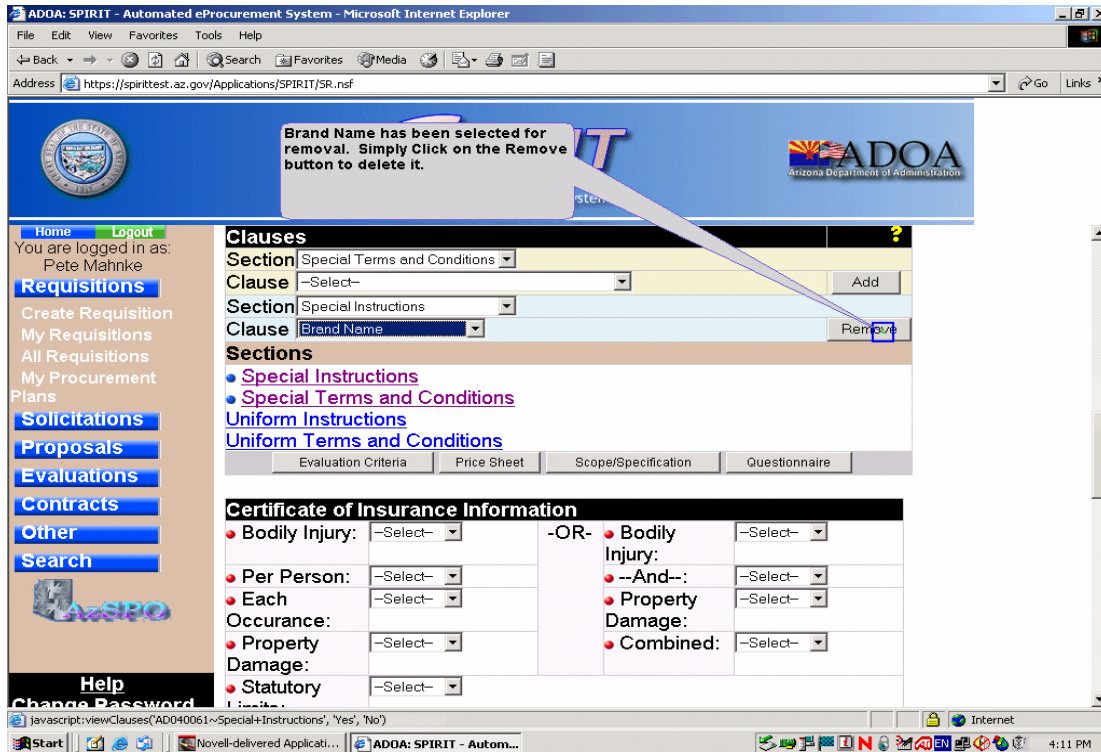
Removing Clauses

This next process covers removing any clause(s) you may have added to either of the sections

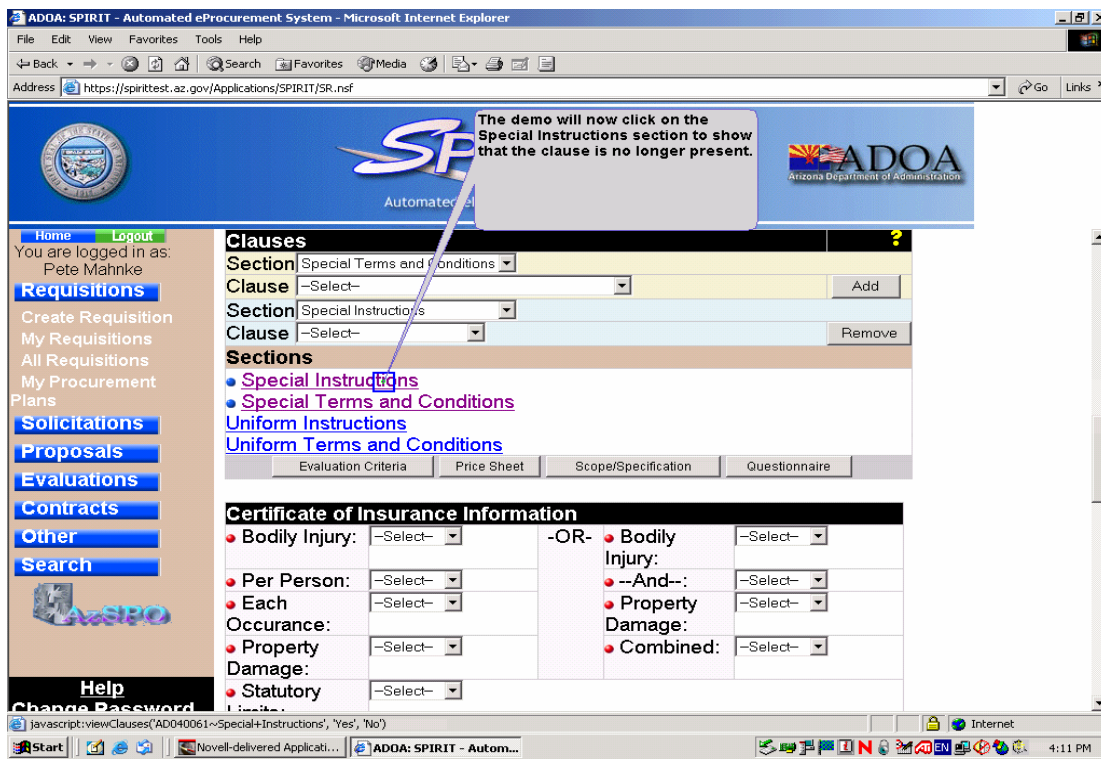


Click on the lower Section drop down menu and select either the Special Instructions or Special Terms and Conditions Section depending upon which one contains the clause you want to remove.

Once you have selected the Section, the Spirit System will load the clauses included so that you may select and remove any. See image next page.



Brand Name has been selected for removal. Simply Click on the Remove button to delete it. The processing please wait window will pop up.



As in the image above, click on the Special Instructions section. When the list opens you will see that the clause is no longer included.

Evaluation Criteria and Evaluators

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File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

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Clauses

Section: [Special Terms and Conditions](#)

Clause: [-Select-](#) [Add](#)

Section: [Special Instructions](#)

Clause: [-Select-](#) [Remove](#)

Sections

- [Special Instructions](#)
- [Special Terms and Conditions](#)
- [Uniform Instructions](#)
- [Uniform Terms and Conditions](#)

[Evaluation Criteria](#) [Price Sheet](#) [Scope/Specification](#) [Questionnaire](#)

Certificate of Insurance Information

Bodily Injury: -Select-	-OR-	Bodily Injury: -Select-
Per Person: -Select-		And-: -Select-
Each Occurrence: -Select-		Property Damage: -Select-
Property Damage: -Select-		Combined: -Select-
Statutory: -Select-		

javascript:viewClauses('ADO40061~Uniform+Terms+and+Conditions', 'Yes', 'No')

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom... Internet 4:12 PM

Click on the [Evaluation Criteria](#) button and the Evaluation Criteria window will open

Evaluation Criteria
Solicitation # AD040061
Draft
Page loaded on 08/22/2003 at 04:06:32 PM
♦ = Required Field

General Information

♦ Evaluation Due: 9/1/2003
Date:
Evaluation Meeting: 09/01/2003
Clarifications: 09/01/2003
♦ Clarifications Due: 9/1/2003
Date:
♦ Instructions
Please Evaluate
♦ Evaluators
Add Remove

Certificate of Insurance Information

♦ Bodily Injury: -Select-	-OR-	♦ Bodily Injury: -Select-
♦ Per Person: -Select-		♦ --And--: -Select-
♦ Each: -Select-		♦ Property Damage: -Select-
♦ Occurance: -Select-		♦ Combined: -Select-
♦ Property Damage: -Select-		
♦ Statutory: -Select-		

Note, that if necessary, you can change the Evaluation Due Date and Clarifications Due Date here.

The Clarifications Due Date refers to the date you would like to receive clarification questions from the evaluators if they have any.

Instructions to the evaluators must be included in the Instructions window. The text wraps and scrolls, so you should have no need of additional writing area. If necessary, instructions can also be sent outside the Spirit System and attached later to the contract.

Adding Evaluators

ADOA: SPIRIT - Automated eProcurement

File Edit View Favorites Tools

Back Forward Stop Home Search

Address <https://spirittest.az.gov/Applications/EvaluationCriteria.aspx>

ADOA: SPIRIT - Automated eProcurement

Home Logout

You are logged in as:
Pete Mahnke

Requisitions

Create Requisition
My Requisitions
All Requisitions
My Procurement Plans

Solicitations

Proposals

Evaluations

Contracts

Other

Search

Help
Change Password

SPIRIT: Evaluation Criteria - Microsoft Internet Explorer

Date: Evaluation Meeting: 09/01/2003
Clarifications: 09/01/2003
Clarifications Due: 9/1/2003

Date:
Instructions: Please Evaluate

Evaluators

Add Remove

None

Evaluation Criteria

Add 1

Type: ☐ Weighted ☐ Points

#	Evaluation Criteria	Pts
1	Conformance to Terms & Conditions and to Scope of Work	400

Certificate of Insurance Information

Bodily Injury: -Select- -OR- Bodily Injury: -Select-
 Per Person: -Select- --And--: -Select-
 Each Occurrence: -Select- Property Damage: -Select-
 Property Damage: -Select- Combined: -Select-
 Statutory: -Select-

JavaScript: viewClauses('ADO40061~Uniform+Terms+and+Conditions', 'Yes', 'No')

Start Novell-delivered Application ADOA: SPIRIT - Automate... SPIRIT: Evaluation Crit... 4:12 PM

Individuals that may assist this office in the evaluation of solicitations will need to be added by the Spirit Administrator. We may have some people that participate more than others and may already be included. However, if those you are using are not, they will need to receive training and have a profile created in SPIRIT by the SPIRIT Administrator.

Note that having evaluators assigned to an RFP is a requirement; if none are included you cannot publish a solicitation. If none of your evaluators have a profile in the system you can add yourself as an evaluator, this will satisfy the functional requirement of the application. Once the evaluators are created, you may then remove yourself and add them. This is possible up until Proposal Evaluation Reports are created, but more on those later.

CLICK on the  button.

Evaluators
By Name
Page loaded on 08/22/2003 at 04:06:46 PM.

Search

Name	Gov't Entity
<input type="checkbox"/> bill bill/Accountancy Board	Accountancy Board
<input type="checkbox"/> bill2 bill2/az.gov	az.gov
<input type="checkbox"/> bobby bobby/Accountancy Board	Accountancy Board
<input type="checkbox"/> Donna Boone/Arizona State Procurement Office	Arizona State Procurement Office
<input type="checkbox"/> eval uator/az.gov	az.gov

1 Conformance to Terms & Conditions and to Scope of Work Pts 400

Certificate of Insurance Information

Bodily Injury: -Select-	-OR-	Bodily Injury: -Select-
Per Person: -Select-		--And--: -Select-
Each Occurrence: -Select-		Property Damage: -Select-
Property Damage: -Select-		Combined: -Select-
Statutory: -Select-		

Evaluators in the system will appear in this window. If the list gets lengthy, you may use the search field to narrow down the list.

Place a checkmark in the box to the left of the evaluator(s) you wish to include.

Once selections have been made, scroll to the bottom of the window and Click the

 button.

Viewing Evaluator contact information

General Information

• Evaluation Due Date: 9/1/2003

• Clarifications Due Date: 9/1/2003

• Instructions: Please Evaluate

• Evaluators

bill bill/Accountancy Board
 bill 12/az.gov
 evaluator/az.gov

Evaluation Criteria

Type: ☐ Weighted ☐ Points

Certificate of Insurance Information

• Bodily Injury: -Select-	-OR-	• Bodily Injury: -Select-
• Per Person: -Select-		• --And--: -Select-
• Each Occurrence: -Select-		• Property Damage: -Select-
• Property Damage: -Select-		• Combined: -Select-
• Statutory: -Select-		

After the screen refreshes the evaluators will be included.

The evaluator's names are links, so that you can look up their contact information. Click on a link and the evaluators user profile opens.

To close this window you may click on the X, Or you may Right Click on the screen with your mouse and click on back.

To Remove an evaluator from the solicitation

ADOA: SPIRIT - Automated eProcurement

File Edit View Favorites Tools

Address: <https://spiritest.az.gov/Applic...>

General Information

• Evaluation Due: 9/1/2003

Date: 09/01/2003

Evaluation Meeting: 09/01/2003

Clarifications: 09/01/2003

• Clarifications Due: 9/1/2003

Date:

• Instructions

Please Evaluate

• Evaluators

Add Remove

[bill bill/Accountancy Board](#)

[bill2 bill2/az.gov](#)

[eval uator/az.gov](#)

Evaluation Criteria

Add 1

Type: ☐ Weighted ☐ Points

Certificate of Insurance Information

• Bodily Injury: -Select- -OR- • Bodily Injury: -Select-

• Per Person: -Select- • --And--: -Select-

• Each: -Select- • Property Damage: -Select-

• Occurance: -Select- • Combined: -Select-

• Property Damage: -Select-

• Statutory: -Select-

Help Change Password

Start Novell-delivered Applicati... ADOA: SPIRIT - Automat... SPIRIT: Evaluation Crit... Internet 4:13 PM

Click on the **Remove** button.

The list of evaluators included with the solicitation will open in a new window.

Place a checkmark by clicking in the box to the left of the name(s) you wish to remove, click on the **OK** button; the evaluator has been removed

Evaluation Criteria

SPIRIT: Evaluation Criteria - Microsoft Internet Explorer

Evaluation Criteria

Add 1

Type: ☐ Weighted ☒ Points

#	Evaluation Criteria	Pts	
1	Conformance to Terms & Conditions and to Scope of Work Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Conformance Cat	400	↓
2	Key Personnel/Qualifications Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Key P/Q Cat	300	↑ ↓
3	Methodology Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Method Cat	200	↑ ↓
4	Cost Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Cost Cat	100	↑ ↓

Save as: ☒ Draft ☐ Complete

Note the area with the Add 1 functionality

You may include additional criteria in addition to or in place of the four system default categories. If you Clicked on add now, it would add one more criteria. Or you can add multiple at one time by the selecting the number you wish to add from the drop down menu.

You also select what type of evaluation it will be by selecting Weighted or Points (default).

Evaluation Criteria

Add 1

Type: ☐ Weighted ☒ Points

#	Evaluation Criteria	Pts	
1	Conformance to Terms & Conditions and to Scope of Work Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Conformance Cat	400	↓
2	Key Personnel/Qualifications Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Key P/Q Cat	300	↑ ↓
3	Methodology Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Method Cat	200	↑ ↓
4	Cost Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Cost Cat	100	↑ ↓

Save as: ☒ Draft ☐ Complete

Each of the four default criteria is selectable from each drop down menu. For instance, 1 Conformance. If you were to click on its drop down menu, methodology, key personnel and cost would be available and other criteria are listed.

You also have the sub-categories of: strengths, weaknesses, other, and conformance category. Each one selected, by clicking in the corresponding box adds that factor and includes an additional area for evaluator comment.

NOTE: If at anytime during the drafting of a solicitation you have a need for an additional criteria; the user may contact the SPIRIT Administrator and request that the criteria necessary be created. If requesting this, include the subcategories you would like identified with the criteria.

SPIRIT: Evaluation Criteria - Microsoft Internet Explorer

Type: ☒ Weighted ☐ Points

#	Evaluation Criteria	Pts
1	Conformance to Terms & Conditions and to Scope of Work Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Conformance Cat	400
2	Methodology Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Method Cat	300
3	Key Personnel/Qualifications Categories: <input checked="" type="checkbox"/> Strengths <input checked="" type="checkbox"/> Weaknesses <input type="checkbox"/> Other <input type="checkbox"/> Key P/Q Cat	200
4	Cost	100

If the default order of importance does not suit your evaluation; you may use the drop down menus to change and select a different order or use the simpler means by clicking the up or down arrow next to the score of the one you wish to move

Certificate of Insurance Information

<input checked="" type="radio"/> Bodily Injury: <input type="text" value="--Select--"/> <input checked="" type="radio"/> Per Person: <input type="text" value="--Select--"/> <input checked="" type="radio"/> Each: <input type="text" value="--Select--"/> <input checked="" type="radio"/> Occurance: <input type="text" value="--Select--"/> <input checked="" type="radio"/> Property Damage: <input type="text" value="--Select--"/> <input checked="" type="radio"/> Statutory: <input type="text" value="--Select--"/>	<input checked="" type="radio"/> -OR- <input type="text" value="--Select--"/> <input checked="" type="radio"/> Bodily Injury: <input type="text" value="--Select--"/> <input checked="" type="radio"/> --And--: <input type="text" value="--Select--"/> <input checked="" type="radio"/> Property Damage: <input type="text" value="--Select--"/> <input checked="" type="radio"/> Combined: <input type="text" value="--Select--"/>
--	--

Help
Change Password

http://www.adoa.state.az.us/

Novell-delivered Applic... ADOA: SPIRIT - Automat... SPIRIT: Evaluation Crit... 4:13 PM

If the default order of importance does not suit your evaluation; you may use the drop down menus to change and select a different order or use the simpler means by clicking the up or down arrow to the right of the criteria you wish to move

You may also select what criteria you want and where, by selecting it from the drop down menu where you want it to appear. Make sure that you don't end up with two of the same criteria.

When satisfied with the criteria, you may change the Save as: to Complete and click on the

button.

You will be able to make changes to the criteria prior to publication.

If you feel safer not changing the status to complete leave it as Draft and click on the Submit button. If you forget to change its status and attempt to publish the solicitation, Spirit will generate an error message informing you that the evaluation criteria is not yet completed.

The Price Sheet

This portion of the manual will guide you through the process of completing the Price Sheet in a solicitation.

You will be shown how to create the Line Item in the solicitation using the information from the requisition. Spirit System brings the information over from the requisition, so there is no labor involved there.

Additional Line Items and deleting them will also be included.

Click on the Price Sheet button

Solicitation Price Sheet
Solicitation # AD040061

Price Sheet

Solicitation		RFP	Tabulation Grouping:							
LI #	Cm Code	Commodity Code Description	Pricing	Qty	UOM	Group	Alt?	Include	Detail	
1	0070-0020	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)		10	Each	---	No		No	

The commodity code has loaded from the requisition.

Certificate of Insurance Information

☐ Bodily Injury:
☐ -OR- ☐ Bodily Injury:

☐ Per Person:
☐ --And--:

☐ Each Occurrence:
☐ Property Damage:

☐ Property Damage:
☐ Combined:

☐ Statutory:

The commodity code(s) load from the requisition.

Clicking on the Pricing link opens a window defining the pricing options

Price Sheet Column definitions:

LI # = line item number

Cm Code #, Cm Code Item # = comm code number and comm code item number

Commodity Code Description... = self explanatory

Qty = Quantity

UOM = Unit of Measure

Group = group a line item may be part of

Alt? = indicates if a supplier is welcome to offer an Alternate

Include = indicates what you may want the supplier to include

Column definitions continued:

Detail = indicates whether or not you want them include a specific detail

Add Line Item = is used to create and add additional line items

This link opens the requisition line item information, however, all the information you need is right in front of you.

Solicitation Line Item
Solicitation # AD040061, Line Item # 1
 Draft
 loaded on 08/22/2003 at 04:08:59 PM.

Solicitation Line Item
Solicitation Line Item #1

[View Requisition Line Item Information](#)
 0070-0020 - Motor Scooters and Trucksters,
 Electric Powered (Including Golf Carts and All
 Terrain Vehicles)

Commodity Code Item **Pricing** **Qty** **UOM** **Group**

Select [0070-0020] Search [] [10] Each []

☐ Allow Alternates ☐ Include:
☐ Detail Note ☐ Manufacturer ☐ Model ☐ Catalog #
☐ Date ☐ Part #

Save as: ☐ Draft ☐ Complete

Submit Cancel Reset

Per Person: -Select- **Injury:** -Select-
Each: -Select- **--And--:** -Select-
Occurance: -Select- **Property:** -Select-
Property: -Select- **Damage:** -Select-
Damage: -Select- **Combined:** -Select-
Statutory: -Select-

[View Requisition Line Item Information](#) link in the image above opens the requisition line item information, however, all the information you need is right in front of you.

Pricing type: Fixed Price = FP, Discount Off List Price = DLP and Percent of List Price = PLP can be select from the Pricing drop down menu.

Qty = Quantity can be edited by typing any new quantity requirements if they have changed since the requisition creation.

UOM = Unit of Measure allows for selecting a more appropriate measure if that included in the requisition was not accurate enough.

Group = allows for including line items in a specific group. The Spirit System includes groups A - Z, it then goes to aa, bb, cc, etc.

The checkboxes will be discussed further in more detail shortly.

In Spirit, the commodity code is broken down to the item level. It is at this point that you would select the appropriate item description.

Since the Spirit System is new, the commodity code item description is likely not in the system yet. See section on Requesting a Commodity Code Item

LI #	Cm Code # Cm Code Item #	Commodity Code Description Commodity Code Item Description
1	0070-0018	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles)
	0070-0018-0001	Motor Scooters

Click on the line item number (indicated by arrow, image above), to open the window that allows for completing the details of the line item.

Solicitation Line Item
Solicitation # AD040061, Line Item # 1
Draft
Page loaded on 08/22/2003 at 04:08:59 PM.

Commodity Code Item
Select: 0070-0020 Search
Include:
☐ Allow Alternates
☐ Detail Note
☐ Manufacturer ☐ Model ☐ Catalog #
☐ Date ☐ Part #

Save as: ☒ Draft ☐ Complete
Submit Cancel Reset

Per Person: -Select-
Each Occurance: -Select-
Property Damage: -Select-
Statutory: -Select-
Injury:
--And--: -Select-
Property Damage: -Select-
Combined: -Select-

Once in the Line Item itself you must complete what is necessary to the solicitation. This process begins with the identification of Commodity Code Item Numbers. If none exist they will need to be created by the SPIRIT Administrator. If they are already within the system you may continue the process by clicking on the Search button. The search will be by the Commodity Code and Subclass entered. The results of which will be any Commodity Code items assigned to the particular code.

To search for the commodity code item, click on the Search button. The window that opens will list the commodity code items available for 0070-0020. Scroll through the list of those available, to select the item you want, click on its link to load it into the line item. See image below

The screenshot shows the SPIRIT web application interface. On the left, a sidebar contains navigation links: Proposals, Evaluations, Contracts, Other, Search, and Help. The main content area is divided into two panes. The left pane, titled "SPIRIT: Search Results", shows a search for "0070-0020" resulting in "8 Documents Found". It lists three items: "0070-0020 Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)", "0070-0020-0001 Motor Scooters", "0070-0020-0002 All Terrain", and "0070-0020-0003 Trucksters,". The right pane, titled "Solicitation Line Item", shows details for "Solicitation # AD040061, Line Item # 1" in "Draft" status. It includes a "View Requisition Line Item Information" link and a description: "0070-0020 - Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)". Below this, there are fields for "Commodity Code Item" (0020), "Pricing" (10), "Qty" (Each), and "UOM" (Each). There are also checkboxes for "Include: Manufacturer, Model, Catalog #, Date, Part #". At the bottom, there are "Save as: Draft Complete" buttons and a "Submit" button. The bottom of the screen shows a Windows taskbar with various open applications and the system clock at 4:15 PM.

When the document reloads it will include the commodity code item detail.

To select the pricing type click on the drop down menu to select it

The Quantity and UOM are copied by SPIRIT from the requisition (these can be changed if necessary).

For this commodity and in this instance, the PO requires the manufacturer name, as well as the model. These are selected by clicking in the box to select the desired requirements

Model Number is selected if appropriate.


We will also select Catalog #. With this selected, a field will be included on the suppliers response side that will allow them to enter their website. This will allow the functionality of including a link in their contract (if awarded), directly to the products on contract.

Date is checked with reference to the catalog.

Part # is selected if appropriate.

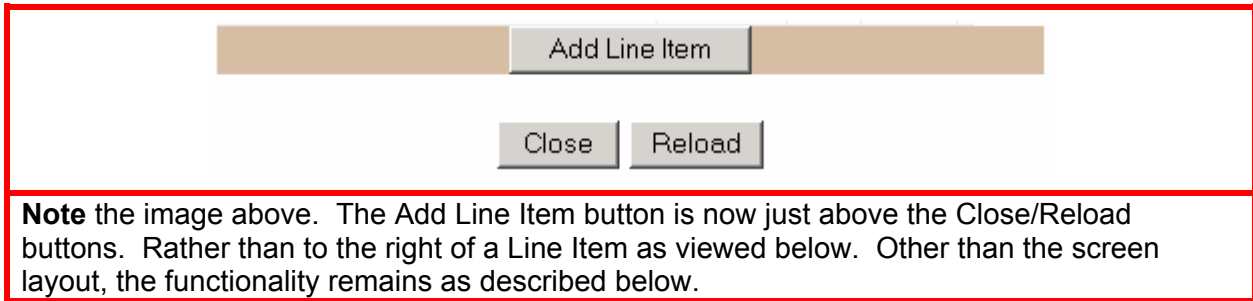
Checking the Alternate box would indicate to the supplier that an alternate to that which we are requesting is acceptable.

Detail Note is checked if you wish the supplier to respond to something that may be typed in the field beneath it.

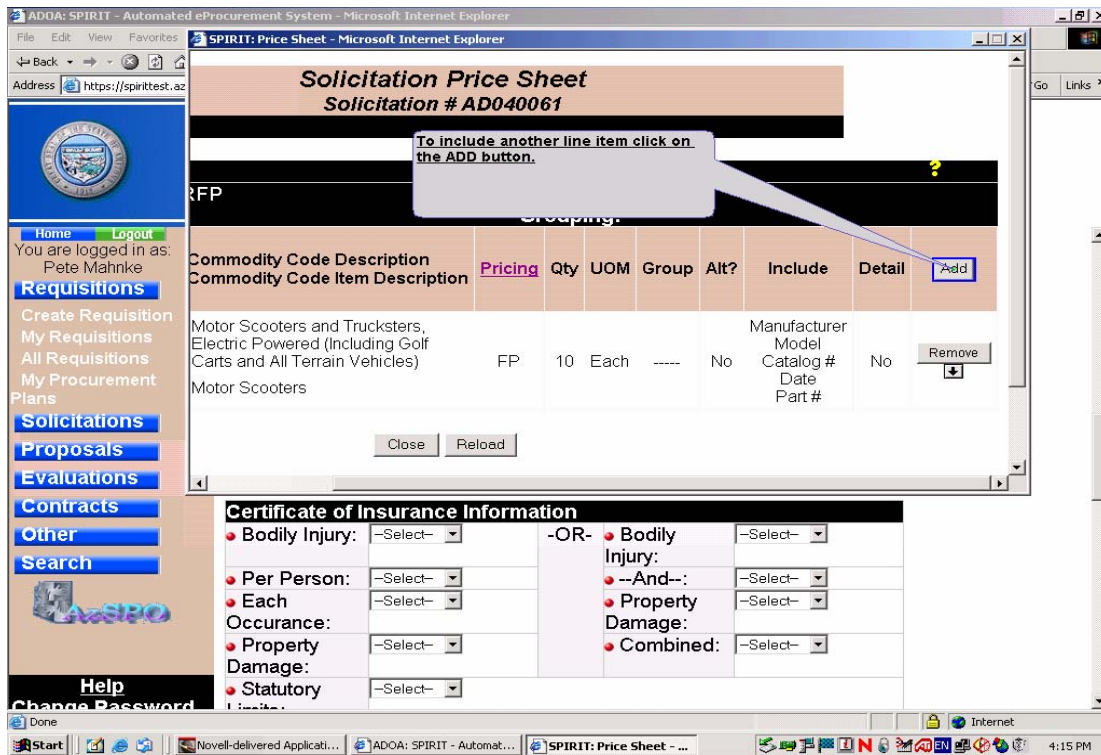
When the line item information is complete, change the Save as status from the default of Draft to Complete then click on the  button.

If you save it as complete you will still be able to make any necessary changes prior to publishing the solicitation.

You may also save it as Draft status; however, it will need to be set as complete to publish the solicitation. If you forget, Spirit will let you know by way of an error message when you try to publish.

Adding a Line Item

Note the image above. The Add Line Item button is now just above the Close/Reload buttons. Rather than to the right of a Line Item as viewed below. Other than the screen layout, the functionality remains as described below.



To include another line item click on the **Add Line Item** button. A blank line item will be created. You can either use the same code as in the previous line item or use a different one. The same steps as covered previously are used when creating additional line items

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

SPIRIT: Price Sheet - Microsoft Internet Explorer

Address: https://spirittest.az

Grouping:

Commodity Code Description	Pricing	Qty	UOM	Group	Alt?	Include	Detail	Add
Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)	FP	10	Each	----	No	Manufacturer Model Catalog # Date Part #	No	Remove
Motor Scooters								
Motor Scooters (Engine Driven Vehicles)								Remove
All Terrain Vehicles								

To change the order of the line items you would click on the up or down arrow. Remember 0070-0020 is line item number one.

Close Reload

These pages are maintained by the Arizona State Procurement Office. Please send comments, suggestions, or questions to the [Site Administrator](#).
State of Arizona Department of Administration - Arizona State Procurement Office

Certificate of Insurance Information

Bodily Injury:	-Select-	-OR-	Bodily Injury:	-Select-
Per Person:	-Select-		--And--:	-Select-
Each	-Select-		Property Damage:	-Select-
Occurance:			Combined:	-Select-
Property Damage:	-Select-			
Statutory	-Select-			

Help
Change Password

Done

Start

Novell-delivered Applicati...

ADOA: SPIRIT - Automat...

SPIRIT: Price Sheet - ...

Internet

4:16 PM

To change the order of the line items, click on either the up or down arrow to the right of the line item you would like to move.

Use the **Remove** buttons (above each up/down arrow), to delete any line item

Click on the **Close** button when you are done with the Price Sheet. You can also use the Windows X in the top right corner of the Price Sheet to close the document.

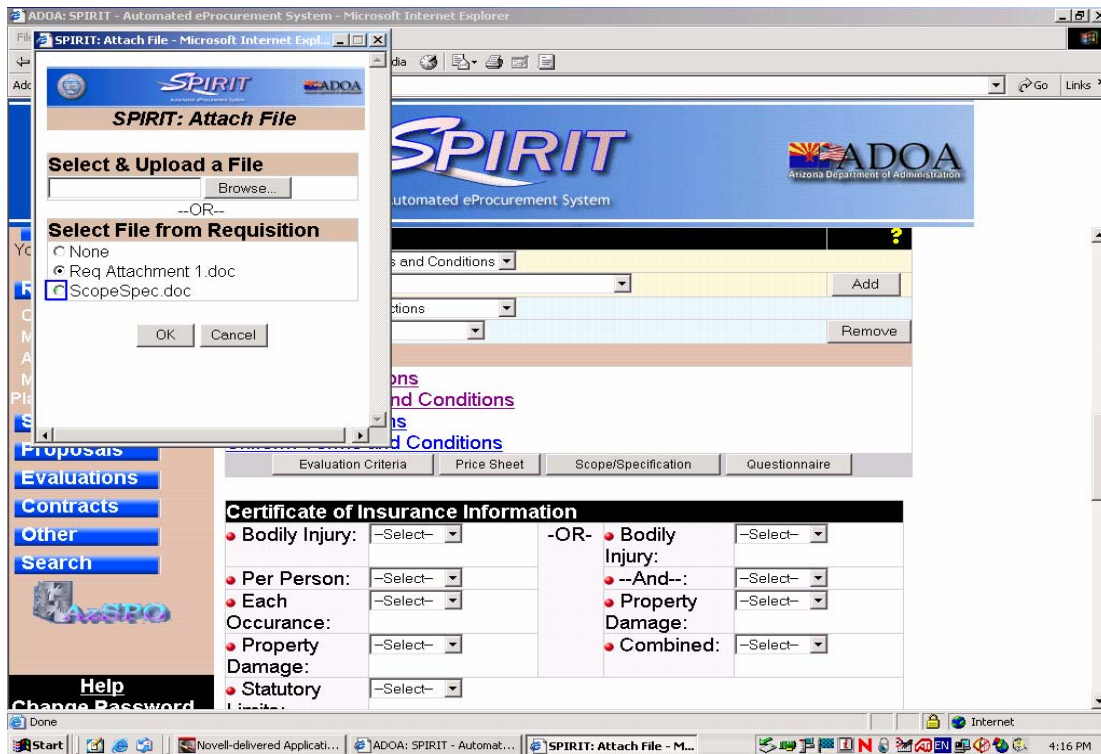
BEST PRACTICE FOR THE PRICE SHEET AND SUGGESTED SUPPLIERS :

It is at the time you create and submit the price sheet that the Spirit System queries the database and loads the appropriate suppliers. Oftentimes the process of drafting a solicitation and publishing it is a few weeks. During these few weeks a number of suppliers have probably registered that may be interested in this solicitation.

In order to reach these suppliers you should resubmit one line item that is representative of each different commodity code used in the solicitation. To do this, you would go back into the price sheet, then go to each of the representative line items and submit them again. This will re-query the database and include those additional suppliers that may have registered while you were drafting the solicitation.

The Spirit System is set up to notify suppliers of a solicitations existence if they were registered prior to your drafting the solicitation. Spirits functionality also notifies suppliers if they register for a code used after a solicitation has been published. However, it will not notify the suppliers that may have registered while you were drafting the solicitation. To avoid missing these suppliers, the previous steps mentioned above should suffice in reaching the appropriate suppliers each time you draft a solicitation.

Scope of Work/Specification



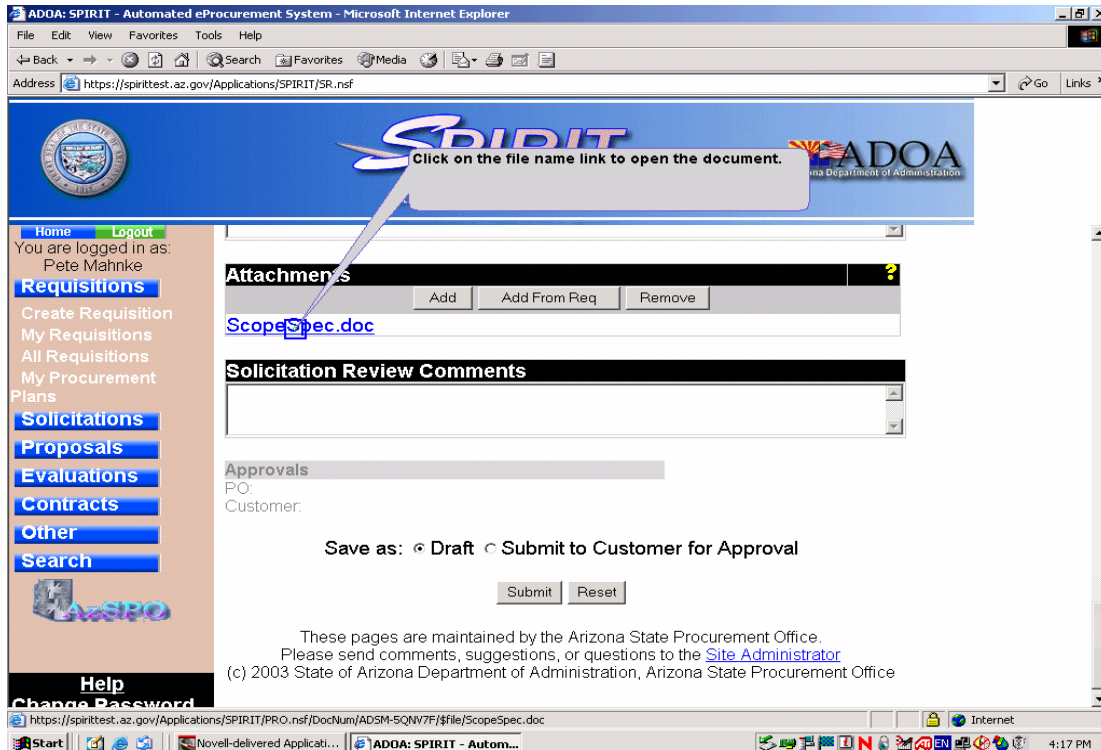
To add the Scope of Work, click on the **Scope/Specification** button. This will open a separate window that will include the documents attached to the requisition. Select the appropriate document by clicking its radio button and then click on the OK button.

As we all know, many times the Scope or Spec that arrives with a requisition is not perfect and will require fixes. If this was the case you may have opened it and saved it as a file you could work on. If this is the case, you will have to click on the **Browse...** button, locate the file and attach it, much like you would an attachment to an e-mail. This is necessary if changes were made to the Scope as the edited Scope is now the most up to date document.

You may also not have received a Scope/Spec with the requisition, but had it e-mailed to you outside the Spirit System. If this is the case, you would also use this method to attach the document.

Once attached; when the Scope/Spec button is now clicked on the document will open in a new window.

There is no limit to the number of documents that you can attach to a solicitation; however, SPIRIT will only allow one document linked to the Scope/Specification button.



If you scroll down the solicitation draft to the Attachment section, you will see the Scope/Specification file name link. You may click on any file name link to open the document.

This is the area of the solicitation that additional documents may be attached and/or removed.

The **Add**, **Add From Req** and **Remove** functionality will be covered later on in the manual.

To touch on it briefly though; clicking on the Add button opens a browse window like that shown during the Scope attachment. Add From Req opens the window that lists documents available for attachment from the requisition. Remove opens a window listing the files attached (including the Scope, if attached). Placing a checkmark in the checkbox and clicking on the OK button will remove that document.

Questionnaire

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

SPIRIT: Questionnaire - Microsoft Internet Explorer

Questionnaire
Solicitation # AD040061
Draft
Page loaded on 08/22/2003 at 04:11:21 PM.
• = Required Field

Questions
• Instructions

Add 1 Select

Save as: ☒ Draft ☐ Complete

Submit Cancel Reset

Contracts
Other
Search

Special Terms and Conditions
Uniform Instructions
Uniform Terms and Conditions

Evaluation Criteria Price Sheet Scope/Specification **Questionnaire**

Certificate of Insurance Information
• Bodily Injury: -Select- -OR- • Bodily Injury: -Select-
• Per Person: -Select- • --And--: -Select-

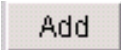

Help
Change Password

Start Novell-delivered Applic... ADOA: SPIRIT - Automot... SPIRIT: Questionnaire ... Internet 4:17 PM

To set up the Questionnaire, click on the **Questionnaire** button. The Questionnaire window will open.

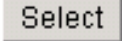
Type a question in the **1** field or paste one that you may have in a Word document.

PASTING BEST PRACTICE: Sometimes the translation from a Word document to a field in Spirit may not be a mirror image of what you copied. For example, quotation marks usually copy into the Spirit System as question marks. To avoid this, prior to copying and pasting from another document, save the Word file as a PLAIN TEXT file type, then copy and paste from that one. This usually solves the dilemma. You may also submit it as draft, then return to view it and correct the few characters that may have changed.

1. You can add more question fields by selecting the number you would like to add from the drop down menu and then click on the Add button.  

NOTE: If you add too many questions to the questionnaire, leave any that you do not use as the last questions in the form. Any blank question fields at the end will not appear in the supplier's copy of the solicitation. If you leave a blank question field between any questions, all question fields following the blank field will be removed. If this happens, contact the SPIRIT Administrator as all is not lost (famous last words).

Oftentimes the same or similar questions are used in questionnaires; an example of which would be regarding exceptions taken. Any of these oft used questions can be found in what is referred to as the Question Bank

To select commonly used questions from the Question Bank, click on the  button found at the right of the question field you are working on.

https://spirittest.az.gov/Applications/SPIRIT/ADM.nsf/GetQuestion?Open...

Questions (Default) By Category


Page loaded on 06/04/2004 at 01:06:44 PM.

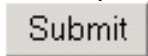
Name	Question
Exceptions	
Exceptions to the Specifications	Completely identify all exceptions that have been taken to the specifications.
Exception Question #2	Just another example exception question. Again, this is not real data, but just test data needed to develop the system.

When the Question Bank opens you will see the listing of available questions. To select a question to use, simply click on its title link. This will load the question into the questionnaire. If you would like you may then edit it in the questionnaire.

Note: once the list of available questions becomes lengthy, you may use the search functionality for keywords.

NOTE: if you have boilerplate questions you would like included in the Question Bank submit them to the SPIRIT Administrator and it will be so.

Like the line items in the Price Sheet, you can change the order of the questions by using the up or down arrows  located to the right of the question you would like to move.

To complete the Questionnaire, change the Save as: to Complete and click on the  button.

If submitted as Draft, you will be informed by the Spirit System if you have forgotten to change it to Complete when you try to publish the solicitation.

Once the Questionnaire has been Submitted you are routed back to the main document.

Certificate of Insurance Information

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://spirittest.az.gov/Applications/SPIRIT/SR.nsf

SPIRIT
Automated eProcurement System

ADOA
Arizona Department of Administration

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All Requisitions
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Certificate of Insurance Information

<ul style="list-style-type: none"> Bodily Injury: -Select- Per Person: -Select- Each Occurrence: -Select- Property Damage: -Select- Statutory Limits: -Select- 	-OR-	<ul style="list-style-type: none"> Bodily Injury: -Select- --And--: -Select- Property Damage: -Select- Combined: -Select-
---	------	---

Price Sheet Information

- Tabulation: ☐ By Line Items ☐ By Group ☐ By Whole Set
- Grouping: -Select-
- Instructions:

Suggested Suppliers

You must select the appropriate amounts for the Certificate of Insurance in this area. The amounts selected will load into the Certificate that will be included in the suppliers solicitation.

Selecting the Insurance Clause in the Special Terms indicated to the Spirit System that you would be including a Certificate. It then included this area in the solicitation.

Simply click on the appropriate drop down menu(s) selecting the amount. If a monetary amount is not necessary for any of the liability/damage amounts select N/A from the drop down menu in each instance. You may also select N/A for all the fields if you like.

PRICE SHEET INFORMATION SECTION

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Price Sheet Information

• **Tabulation** ☒ By Line Items ☐ By Group ☐ By Whole Set

• **Instructions:**

Please price

Suggested Suppliers

Add Remove Search

[View Suppliers](#)

Comments:

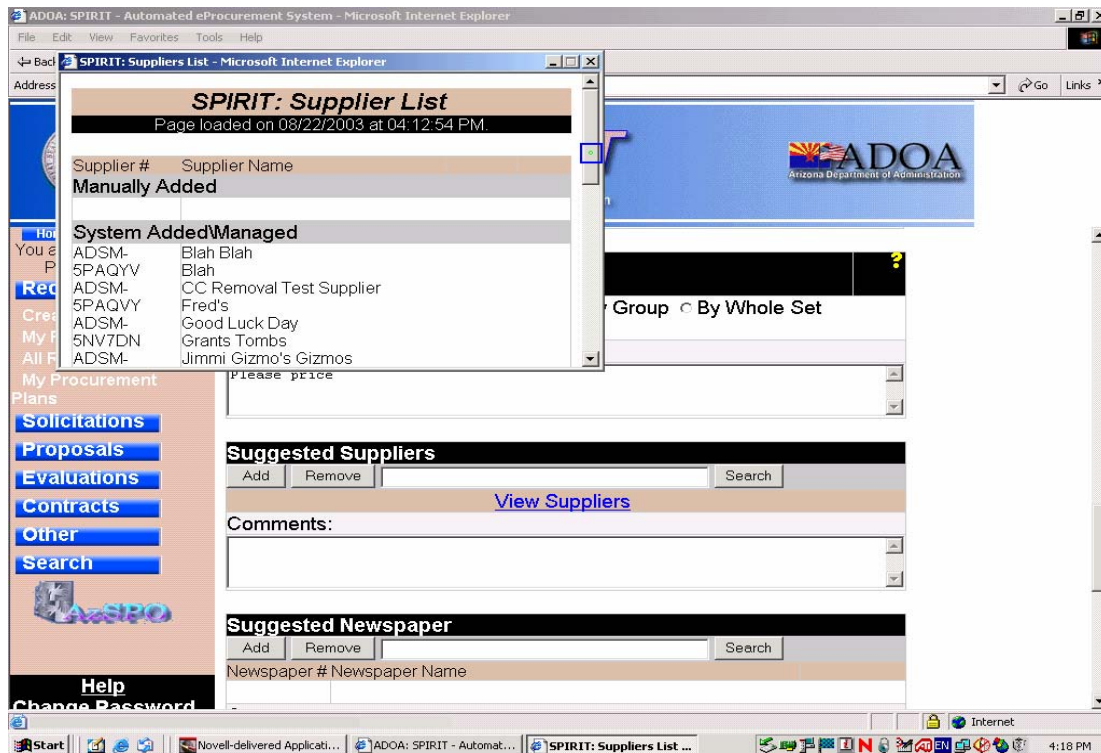
Suggested Newspaper

Add Remove Search

Newspaper # Newspaper Name

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom... 4:18 PM

You must select a Tabulation Group Type. To do so, click inside the appropriate radio button. Instructions to the supplier must also be entered. These instructions will appear on the Price Sheet in the supplier's view of the solicitation.

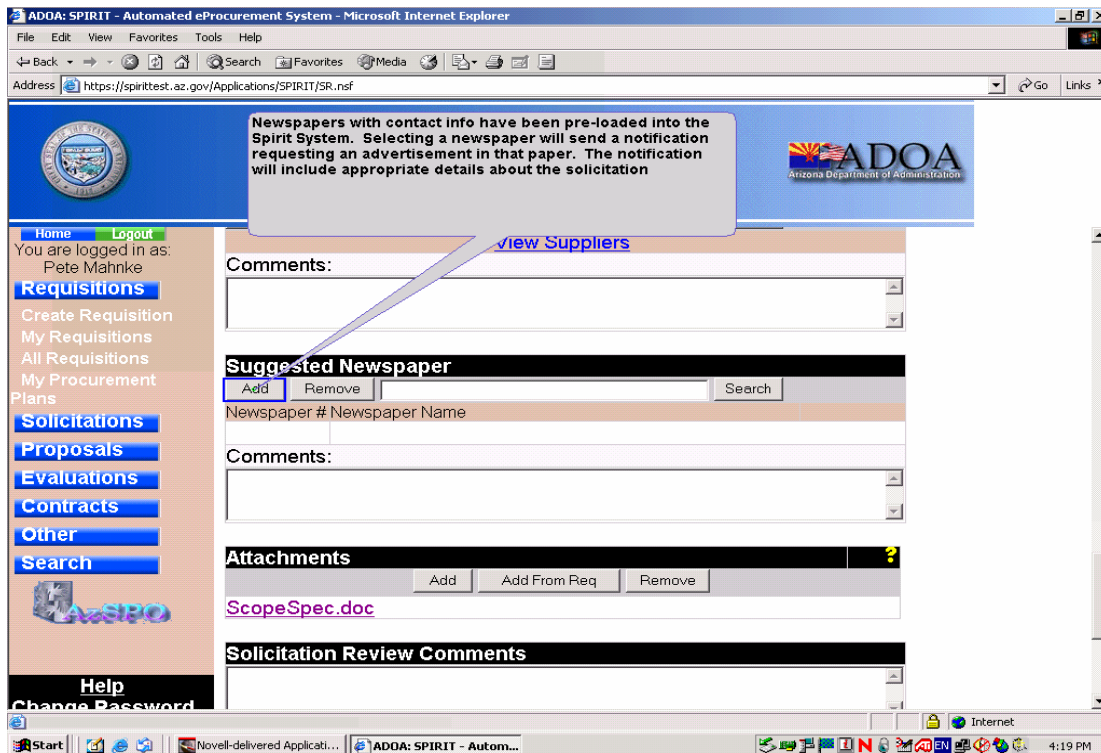


If at anytime you wish to view the suggested suppliers included in the solicitation, click on the View Suppliers link. A window will open listing the suppliers. The suggested suppliers window opens allowing you to scroll through the list. Scroll to the bottom of the window and click the Close button or click on the window X to close.


Like the requisition piece you can search for and add any other suppliers you want to include.

Enter any comments you feel necessary regarding suppliers added in the comments section

Adding a Newspaper



Newspapers with contact info have been pre-loaded into the Spirit System. Selecting a newspaper will send a notification requesting an advertisement in that paper. The notification will include appropriate details about the solicitation similar to that below.

Click on the  button to open the list of Newspapers.

Newspaper Legal Ad

Please do not respond to this e-mail as it is a system generated notification and will be returned to you as undeliverable.

The referenced legal advertisement is being forwarded to you for advertisement in your newspaper. Please run the advertisement within 3 days of receipt of this notification. Please invoice the State Procurement Office at 100 N. 15th Avenue, Suite 104, Phoenix, Arizona 85007 or call 602-542-5511, Fax (602) 542-5508 if you have specific questions.

Please DO include the following information in the ad, preferably at the end as follows:

For further information contact the AZ State Procurement Office at (602) 542-5511 or visit www.spirit@az.gov to register and respond to the solicitation.

Please DO NOT include the Conference Location and Date lines if none is listed.

SPIRIT: Newspapers
Page loaded on 08/22/2003 at 04:13:07 PM.

Search

Newspaper	Address	County
<input type="checkbox"/> Ahwatukee Foothills News	10631 S. 51st St. jconway@aztrib.com Suite 1 Phoenix, AZ 85044	Maricopa
<input type="checkbox"/> Ajo Copper News	10 Pajaro Ajo, AZ 85321	Pima
<input type="checkbox"/> Apache Junction News	1784 W. Superstition Blvd. Apache Junction, AZ 85220	Pinal

Comments:

Attachments

Add Add From Req Remove

[ScopeSpec.doc](#)

Solicitation Review Comments

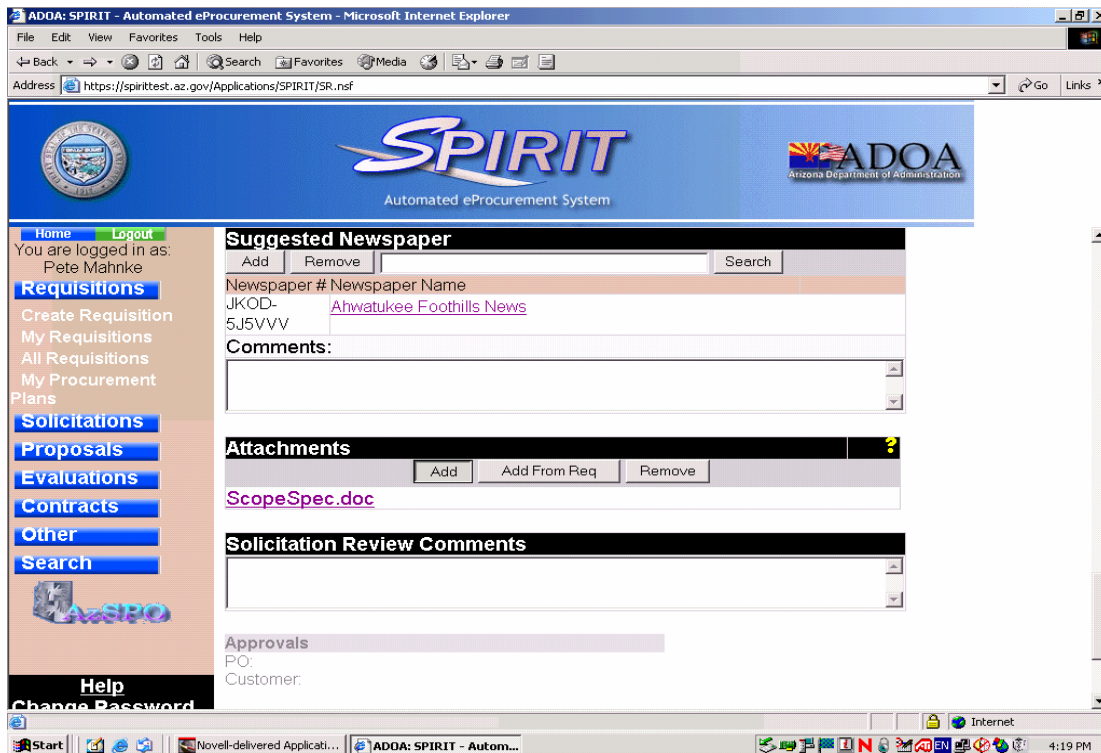
Help
Change Password

Select the newspaper you want the ad to appear in by placing a checkmark in the box ☐ to its left. Scroll to the bottom of the SPIRIT Newspapers screen and click on the OK button.

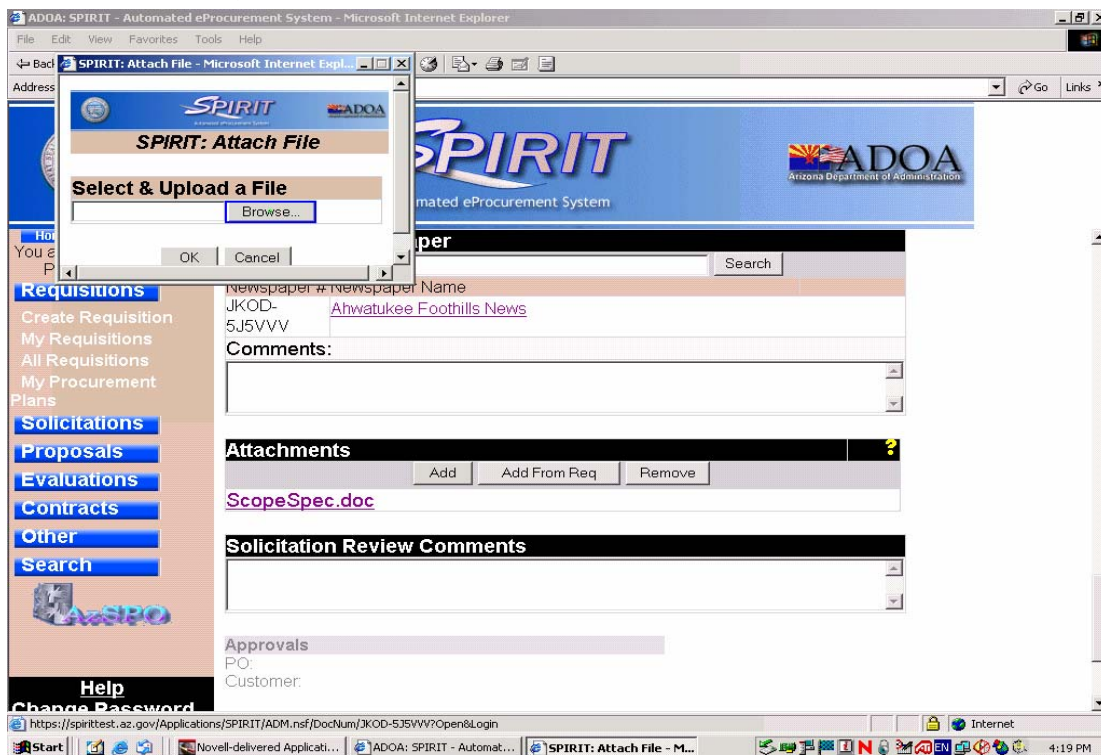
Note that you may also search for a specific paper.

Note that when creating an amendment to a solicitation it will be necessary to remove the Newspaper, unless another legal advertisement is necessary.

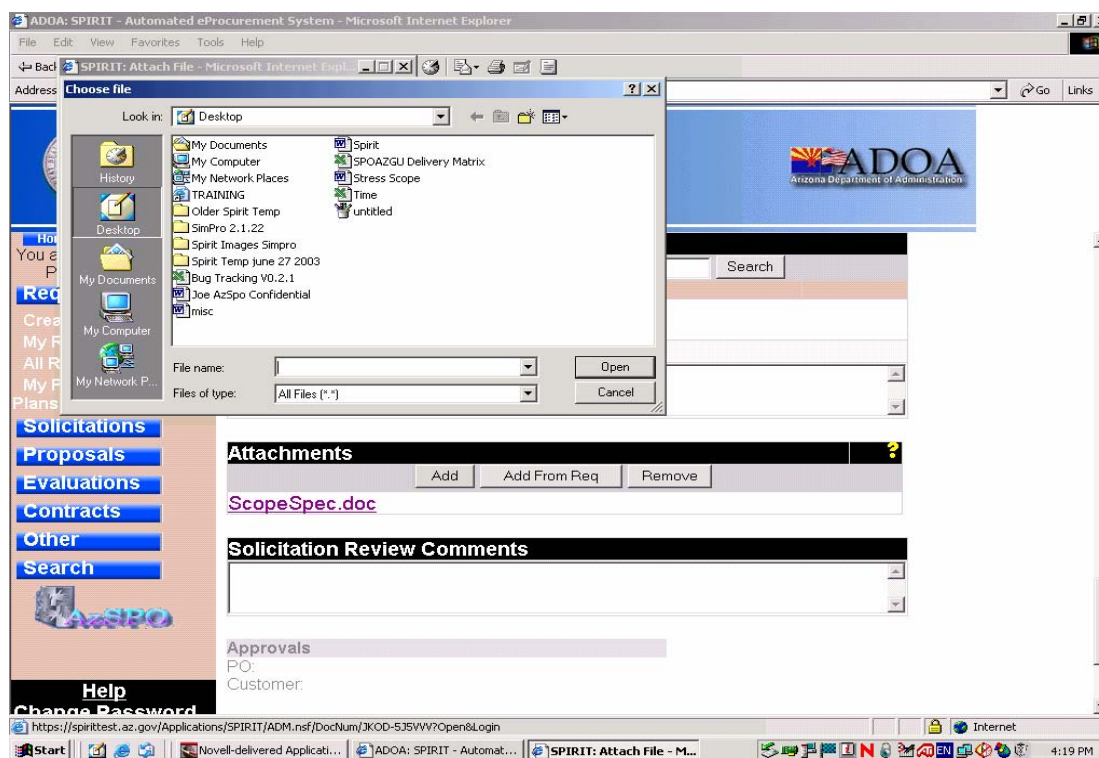
Attachments, Adding and Removing



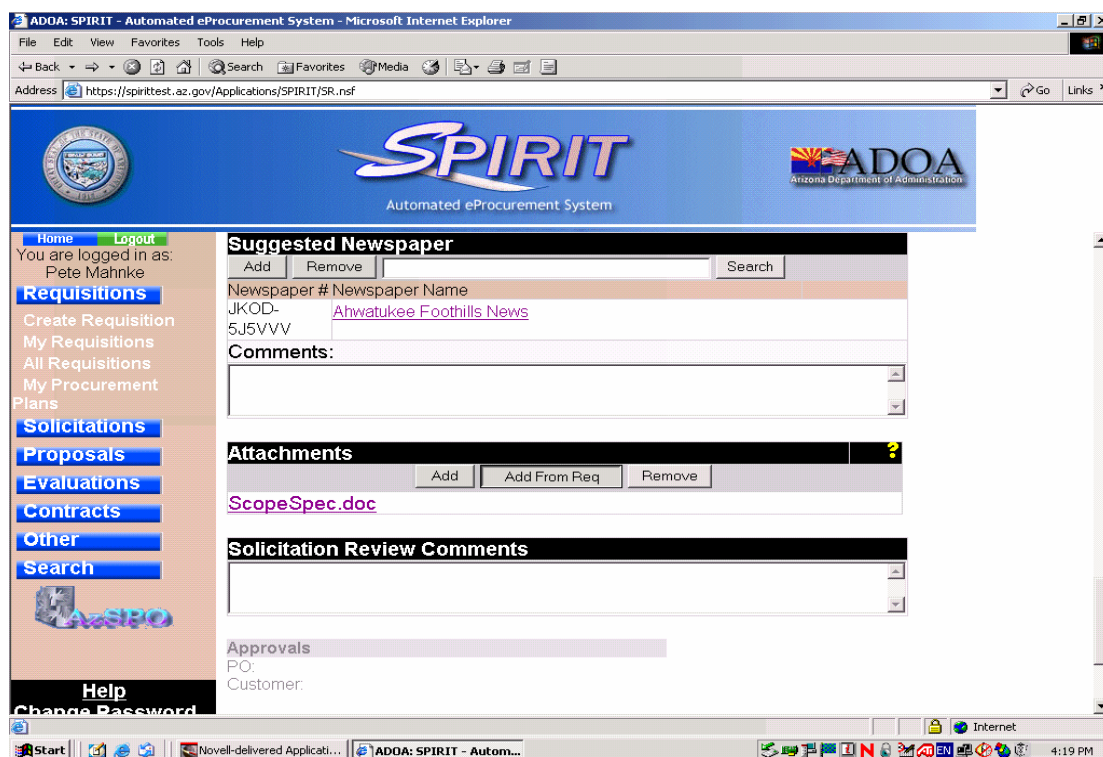
To add an attachment, click on the Add button.



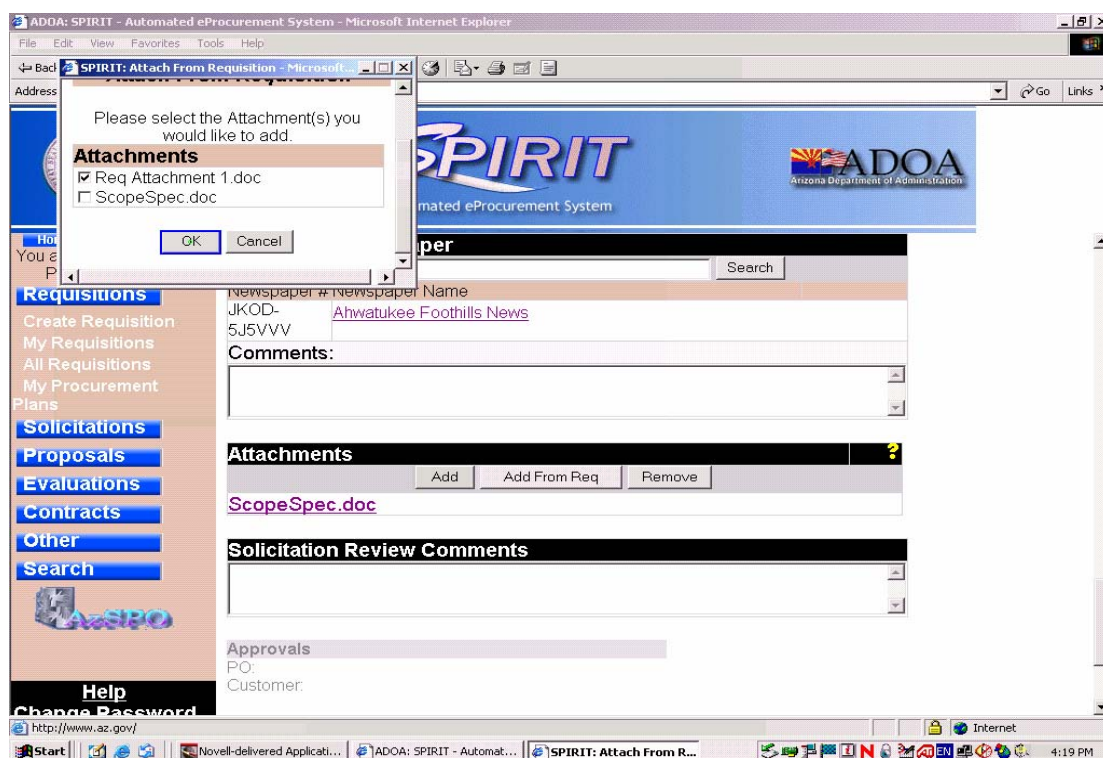
As done when attaching a Scope/Spec, click on the **Browse...** button to search for the file you want to attach (think e-mail attachment)




Choose a file to attach. For the purpose of the manual we will cancel this action by clicking on the **Cancel** button and attach a document by using the **Add From Req** button.

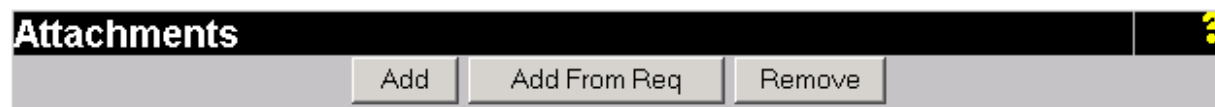


Click on the  button.

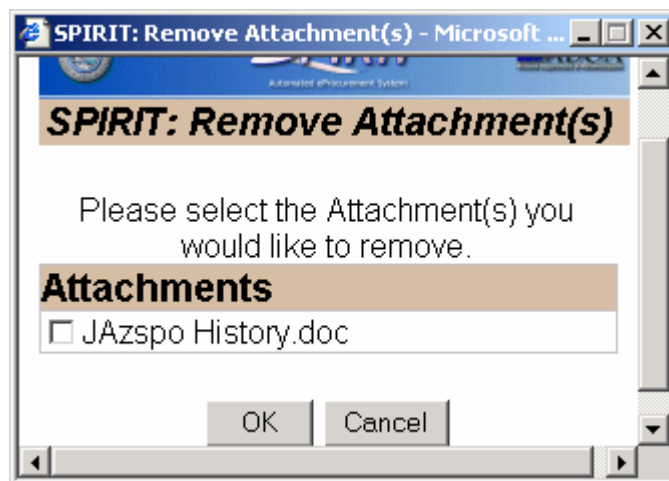



A window opens listing the files attached to the requisition. Select the file(s) to attach and click .

Removing Attachments



In the Attachments section click on the  button



The window above will open listing the files attached. Place a checkmark in the box(es) to the left of the file(s) you wish to remove. Then click on the  button. The file(s) will now be removed from the solicitation.

Note: many of the images regarding attachments have differing files to choose from, this is due to the fact that different solicitations were used to obtain images from. Please disregard any filename discrepancies in this documentation as it is the action, not actual files that are of importance here.

Submitting Solicitation as Draft or Submit to Customer for Approval

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Attachments

Add Add From Req Remove

[ScopeSpec.doc](#)
[Req Attachment 1.doc](#)

Solicitation Review Comments

Approvals
PO:
Customer:

Save as: ☒ Draft ☐ Submit to Customer for Approval

Submit Reset

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Done

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom... 4:19 PM

Make any Comments regarding the solicitation that you feel are necessary.

When you are done with the solicitation draft you must submit it to the Customer for Approval. This approval process will be covered later.

You do not have to be done with the solicitation draft in order to submit for customers approval. You may do this as many times as you feel is necessary during the drafting process.

When you do Submit to the Customer, they will have the option of making certain changes to the draft, which you must then approve prior to publishing the solicitation.

Once you have set the Save as: status to Draft and saved, the Draft status radio button will be replaced by Update. Any time from that point on to save progress on the draft, select the

Update radio button and click on the  button.

NOTE: As mentioned previously, in the majority of, if not all cases you the PO will also be the customer (you created the requisition). This manual does not include information on reacting/accepting changes made by the customer, however, as you are considered the customer as well, you only need to submit back to the PO for approval when playing the part of the customer.

My Solicitations
By Solicitation Number
Page loaded on 08/22/2003 at 04:13:56 PM.

Sol Num	PO	Type	Status	Title	Posted Date	Close Date
AD040061	Pete Mahnke/Arizona State Procurement Office	RFP	Draft	Solicitation Creation		09/01/2003
AD040060	Pete Mahnke/Arizona State Procurement Office	RFP	Draft	How to Create a Requisition		09/01/2003
AD040059	Pete Mahnke/Arizona State Procurement Office	RFP	Closed	Stress Test Training Session 1 RFP 1	08/19/2003	08/20/2003
AD040058	Pete Mahnke/Arizona State	RFP	Closed	Stress Test Training Session 1	08/19/2003	08/20/2003

After clicking on the submit button, you will be routed back to the My Solicitations area in Spirit. Note the status of the solicitation the manual has been creating, [AD040061](#)

IFB and RFQ C set up differences from the RFP or RFQ

The drafting or structure of the IFB and RFQ C (Request for Quotation Cost), is extremely similar to that of the RFP with the exception being Evaluators and Evaluation Criteria.

The IFB and RFQ C do allow for the option of including evaluators for the purpose of assisting you in concluding whether or not the offer meets the Scope or Specification.

For more information on the evaluation and/or awarding of an IFB/RFQ C, see the section entitled IFB Evaluation.

This portion of the manual covers the only major difference between the drafting of an RFP and an IFB or RFQ C.

This particular draft is from an IFB, however, the process for this and an RFQ C are the same. When the manual refers to an IFB it is taking into consideration the fact that the IFB and RFQ C functionally is the same.

The Spirit System allows for the inclusion of evaluators in IFBs and RFQ Cs. It obviously does not include the depth of the evaluation of an RFP, but the PO may require the knowledge of someone that is familiar with that which is being procured. After the close of an IFB or RFQ C, the evaluators will have an area in which they can make comments regarding the offer.

Note that in an IFB the user has a Cost Evaluators section.

Cost Evaluators
Would you like to define Evaluators? <input type="radio"/> Yes <input checked="" type="radio"/> No

Initially this Cost Evaluators section does not have an area to include any evaluators. If you want to include one or more, you would select Yes by clicking in its radio button.

The screen will then refresh with the appropriate buttons to use to include the evaluator(s).

Cost Evaluators
Would you like to define Evaluators? <input checked="" type="radio"/> Yes <input type="radio"/> No
<div>Add Remove</div>
None

Click on the Add button to open the evaluator selection window.

This should be familiar territory to you as it is the same process as that used in the RFP. Once an evaluator has been selected and added the name(s) will appear where the word None is.

Select who you want to include. You would then click on the OK button.

If you needed to remove any, you would click on the Remove button. Like the RFP; a window would open containing the person(s) included with checkboxes to the left of their names. Place a checkmark in the checkbox to the left of the person you wish to remove and click the OK button.

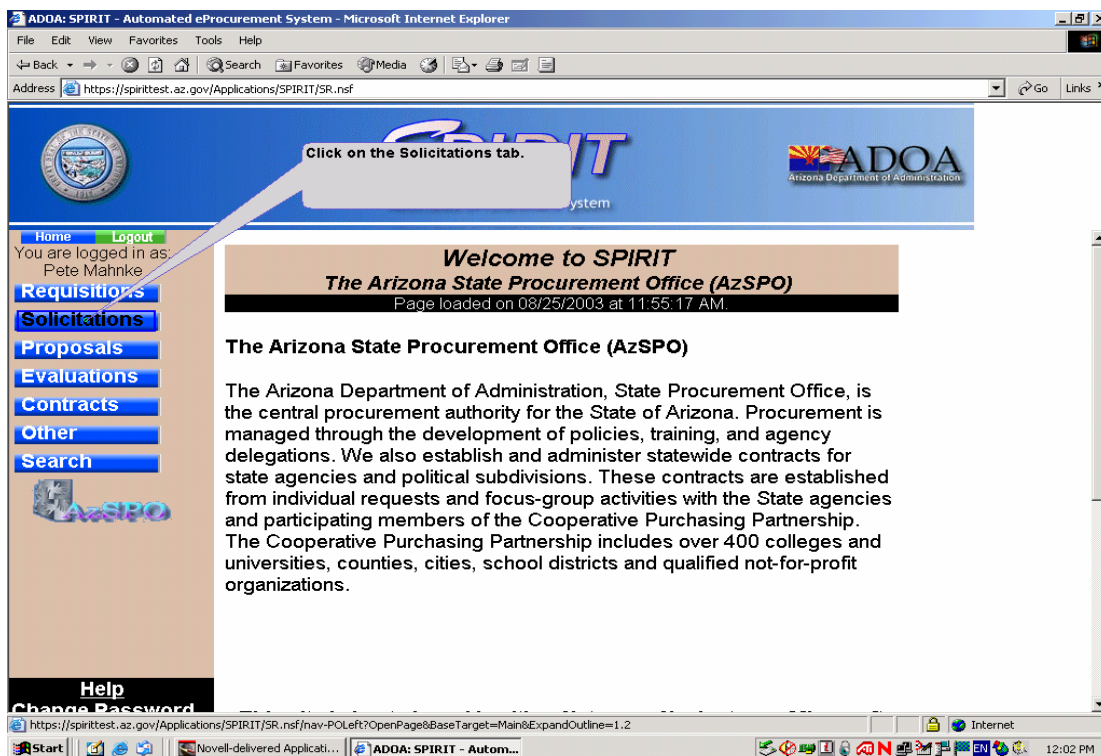
Post solicitation publication processes

Background Information

This portion of the manual will cover:

- Changing the Solicitation Close Date
- Changing/Adding Evaluators
- Amending a Solicitation
- Viewing the Solicitation Tabulation prior to close

Changing the Close Date



In the Azpix system we create and issue an amendment. The Spirit System differs in that, if the only thing you need to do with a solicitation is change the date, you would use the Change Due Date functionality.

When you do this, suppliers are notified via e-mail as to the change in date. The Spirit System also makes that change in the appropriate solicitation field on the supplier side; however, no amendment is created or published.

Click on the **Solicitations** tab after logging in. Click on the **My Solicitations** tab from the sub-menu

Click on the appropriate solicitation number link [AD040061](#) for the manual.

Solicitation Creation
Solicitation #AD040061
Published
 Page loaded on 08/25/2003 at 11:56:56 AM.

Document Information			
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061
Contract TBD #:		Amend. #:	0
Amendment:	No	Date:	08/22/2003
Created By:	Pete Mahnke/Arizona State Procurement Office	Created:	
Requestor:	Pete Mahnke/Arizona State Procurement Office	Gov't Entity:	Arizona State Procurement Office
Process Status:	Solicitation: Published	Status:	Published
Date Published:	08/25/2003	Close Date:	09/01/2003
Type:	RFP		

Solicitation Information
 PO Assigned: Pete Mahnke/Arizona State Procurement Office

Once a solicitation has been published, the **Change Due Date** button will appear and be active. Click on it, this will open a window with a drop down menu allowing you to select a new date.

Note the **Cancel** button. This button is available at all times and is used to cancel a solicitation if necessary.

Click the **OK** button to record the new date.

Note that if and when you create and issue an amendment it will be necessary to change this date to reflect the new Close Date. Since key dates in a solicitation load from the Procurement Plan and as these dates are not editable after publication of the plan, the original Close Date will load into any amendments.

That covers the entire process involved in changing the close date in solicitation. Once you clicked on the OK button after changing the Close Date, the e-mail notification was sent.

Changing/Adding Evaluators

The Evaluation Committee originally included in this solicitation has to be changed due to one of the evaluator's workload.

After logging in and reaching the My Solicitations section of Spirit, Click on the appropriate solicitation number link.

Note that the solicitation is in View mode. Once published you are unable to make any changes other than Close Date or Evaluators without creating an amendment

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Has the Questionnaire Been Changed?

Clauses Sections

[Special Instructions](#)
[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

Evaluation Criteria Price Sheet Scope/Specification Questionnaire

Certificate of Insurance Information

Bodily Injury:	N/A	-OR-	Bodily Injury:	N/A
Per Person:	N/A		--And--:	N/A
Each Occurrence:	N/A		Property Damage:	N/A
Property Damage:	N/A		Combined:	N/A
Statutory Limits:	N/A			

Price Sheet

javascript:viewClauses('ADO40061-A1~Uniform+Terms+and+Conditions', 'No', 'No')

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom... Internet 2:15 PM

Scroll down to the **Evaluation Criteria** button, then click on the **Evaluation Criteria** button

Evaluation Criteria
Solicitation # AD040061-A1
 Page loaded on 08/25/2003 at 02:09:42 PM.

General Information [Change Evaluators](#)

Schedule

Evaluation Due	09/01/2003
Date:	
Evaluation Meeting:	09/01/2003
Clarifications:	09/01/2003
Clarifications Due	09/01/2003
Date:	

Instructions
 Please Evaluate

Evaluators
[bill bill/Accountancy Board](#)
[eval uator/az.gov](#)

Price Sheet

Bodily Injury:	N/A	-OR-	Bodily Injury:	N/A
Per Person:	N/A		--And--:	N/A
Each	N/A		Property	N/A
Occurance:			Damage:	
Property	N/A		Combined:	N/A
Damage:				
Statutory	N/A			
Limits:				

Click on the [Change Evaluators](#) button.

Note the Evaluators included in the bottom left of this corner window.

SPIRIT: Add/Remove Evaluators
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Evaluators

bill bill/Accountancy Board	eval uator/az.gov
---	-----------------------------------

[Add](#) [Remove](#)


[Submit](#) [Cancel](#) [Reset](#)

Click on the Remove button

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To remove an evaluator, click on the  button


The evaluators included in the solicitation will be listed in the Remove Evaluator window that opens.

Place a checkmark in the checkbox to the left of the evaluator(s) you wish to remove by clicking inside the box then click on the  button. The evaluator is removed.

To add an evaluator to replace the one removed (if necessary), click on the  button.

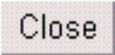
The Evaluators By Name window opens listing the evaluators in the Spirit System, as it did when you selected evaluators while drafting the solicitation. Once the list gets lengthy, you may want to use the search functionality.

Scroll down the window until you find the evaluator you wish to use, and then select them by placing a checkmark in the box to the left of their name.

After selecting the new evaluator(s), continue scrolling to the bottom of the window and click on the  button

The new evaluator will now be included.

Click on the  button if you are done.

Once back at the Evaluation Criteria window, you can scroll down to the bottom of the window and click on the  button or Click on the windows X. That completes the process of changing evaluators in the Spirit System. It is not necessary to do anything else, the evaluators have been addressed.

NOTE: Evaluators can be changed during evaluation up to the point of creation of the Proposal Evaluation Report(s). Any evaluation forms by a removed evaluator will also be removed by the system.

Solicitation Amendment

This section of the Spirit manual covers the process involved in creating a solicitation amendment.

The Spirit System treats all amendments the same regardless of whether for a solicitation or contract. Whereas in Azpix we created an amendment that is physically a separate document from the original; Spirit duplicates the original document, incorporating all the information from the original into the new. When the new document or Amendment is finalized, the old document, whether solicitation or contract is closed out. The new document is then the new active document.

So what you are looking at once created is an entirely new solicitation in a sense.

Once logged in click on the **Solicitations** tab, then click on the **My Solicitations** tab from the sub-menu

Click on the appropriate solicitation number link [AD040061](#)

Solicitation Creation
Solicitation #AD040061
 Published
 Page loaded on 08/25/2003 at 12:04:49 PM.

Document Information			
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061
Contract #:		Amend. #:	0
Amendment:	No	Date	08/22/2003
Created By:	Pete Mahnke/Arizona State Procurement Office	Created:	
Requestor:	Pete Mahnke/Arizona State Procurement Office	Gov't Entity:	Arizona State Procurement Office
Process Status:	Solicitation: Published	Status:	Published
Date Published:	08/25/2003	Close Date:	09/02/2003
Type:	RFP		

Solicitation Information
 PO Assigned: Pete Mahnke/Arizona State Procurement Office

Notice that there is no edit icon, as this is a published solicitation editing is not possible unless in an amendment draft.

Once you have entered the solicitation you must scroll to the bottom of the screen to the Related Documents\Information.

Most if not all processes you will address from the publication moment on will be addressed from this area.

Related Documents\Information (For Internal Use Only)		
1. Amendment(s)	Create	View
2. Tabulation	-----	View
3. Proposals	-----	-----
4. Evaluation(s)	-----	-----
5. Proposal Evaluation Reports	-----	-----
6. Solicitation Evaluation Report	-----	-----
7. Tabulation	-----	-----
8. Contract	-----	-----

Take a moment to examine 1 through 8.

1. Amendments is used to Create and View amendments created.
2. Tabulation allows the PO to view a list of submitted proposals prior to Close.
3. Proposals will be used after the close. You will be able to access the list of proposals to the solicitation. There will be links so that you can then access each individually once you click on View.
4. Evaluations will be used to view the evaluators evaluations for each proposal.
5. Proposal Evaluation Reports, or PER is a step up from the evaluations and are documents/reports that you the PO generates based upon the evaluators completed evaluations.
6. Solicitation Evaluation Report is a step up from the PER, combining all suppliers scores. Much like a tabulation it is here that you will select those suppliers to appear in the Tabulation.
7. Tabulation lists suppliers based upon your selections in the Solicitation Evaluation Report. You will select each award on the screen.
8. Contract is used to create and view contracts created.

All relevant information after close will be covered in greater detail later in the process.

Related Documents\Information (For Internal Use Only)		
1. Amendment(s)	Create	View
2. Tabulation	-----	View
3. Proposals	-----	-----
4. Evaluation(s)	-----	-----
5. Proposal Evaluation Reports	-----	-----
6. Solicitation Evaluation Report	-----	-----
7. Tabulation	-----	-----
8. Contract	-----	-----

To create an amendment, click on the Create link at 1. Amendment(s).

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Solicitation Creation
Solicitation #AD040061-A1
Draft
Page loaded on 08/25/2003 at 12:05:27 PM
• = Required Field

Document Information			
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061-Contract TBD A1
Amendment:	Yes	Amend. #:	1
Created By:	Pete Mahnke/Arizona State Procurement Office	Date:	08/25/2003
Requestor:	Pete Mahnke/Arizona State Procurement Office	Gov't Entity:	Arizona State Procurement Office
Process Status:	Solicitation (Amendment): Draft	Status:	Draft
Date Published:		Close Date:	09/01/2003 Type: RFP

Solicitation Information
PO Assigned: Pete Mahnke/Arizona State Procurement Office

Published

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom...

12:11 PM

The draft Amendment will be created and load into the screen after a "processing please wait" screen. The process may take a few moments as the system is duplicating the solicitation so that you can make any changes

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As mentioned previously, you must select the new Close Date for the amendment as dates were pulled from the original document and the PP.

State Procurement Office
Assigned: Katherine Babonis/Arizona State Procurement Office

• Priority No
• Solicitation: Agency Statewide
• Contract Type: Agency Statewide
• Include Questionnaire? Yes No
• Solicitation Title: Solicitation Creation
• Conference Location: State Procurement Office
• Date: 09/01/2003 10:00 AM
• Procurement Officer Conflict of Interest Acknowledge
(View):
• Description: Solicitation creation

Published

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Internet 12:11 PM

As mentioned previously, you must select the new Close Date for the amendment as dates were pulled from the original document and the PP.

You must re-acknowledge the Conflict of Interest statement.

Type in your amendment language in the Amendment Information window.

Questionnaire and Price Sheet Changes

<input checked="" type="radio"/> Has the Price Sheet Been Changed?	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="radio"/> Has the Questionnaire Been Changed?	<input type="radio"/> Yes <input checked="" type="radio"/> No

These two statements above represent a step you will always need to address when creating a solicitation amendment. Spirit is asking you these questions in order to simplify the proposal response for the supplier. When Spirit duplicates the information from the original document for the amendment, it not only duplicates our internal solicitation. It also duplicates the suppliers proposal if they have already begun drafting one.

If you select yes for either the Price Sheet or Questionnaire, Spirit will not duplicate the suppliers work done to date in either of these sections of their proposal. If nothing has changed in either, Spirit will reproduce those pieces for them.

The reality of the application is that it cannot know exactly where a supplier has drafted information, in for instance the Price Sheet and then match it to any changes you have made. There are too many combinations of options or changes that you may make. If you do change the Price Sheet or Questionnaire in an amendment, Spirit will duplicate the suppliers work done to date with the exception of anything they have entered in the sections in question. If, however you do not change anything in either section, Spirit will then duplicate any work the suppliers have begun in both, because it can map one with the other.

We will be adding a line item to the Price Sheet in this amendment, so the radio button for the Price Sheet will be selected to indicate Yes.

Every piece of the solicitation has been duplicated. If you opened the Questionnaire you would see your questions. You could edit, delete or you could add more if needed.

If you recall, when setting up the price sheet and questionnaire originally as complete, you had the options to save as a draft or as complete. In the amendment, both documents are editable, but only have a status of complete. This is as it is, so that when and if you do publish an amendment it is not necessary to even go into those documents if you don't need to.

To make the changes to the price sheet, Click on the **Price Sheet** button

The process is exactly the same as creating a line item from scratch during the solicitation drafting stage.


Just click on the ADD Line Item button to begin. Or edit what is already there.

As before, the commodity code search results are down to the item level. Click on the link of the one you want to use to load it into the line item. Select the Price Type, Quantity, Unit of Measure and Group (if appropriate).

Check the appropriate details to Include, i.e. manufacturer, model, etc..If you are done, change the Save as: status to Complete and click on the **Submit** button.

If necessary, once back at the Price Sheet you may change the order of the line items by using the Up and Down arrows on the right side of the window.

Type any comments necessary to the customer in the Solicitation Review Comments window. These would be notes to yourself, as you are likely the customer as well.

As with the solicitation, the amendment must go through the approval process. If satisfied with the work, scroll to the bottom of the screen, change the Save as: to Submit to Customer for Approval and click on the Submit button. If, as expected, you are playing both roles; once you submit to the customer, simply return to the solicitation, click on the edit icon,  scroll to the bottom and select Submit to PO for Approval and click on the submit button.

Solicitation Amendment Approval

This next step in the process begins at the point after which, the customer (you?) has approved the amendment and submitted it back to you. If this will be a statewide contract remember that you are the customer since you had to create the requisition to begin the process. Prior to your publishing, you will still need to submit to the customer. However, since you know what you've done, you only need to go in and submit it back to yourself as the PO.

Access the amendment at the Solicitation by Solicitation Number screen or use the link in the notification e-mail that SPIRIT will send out.

By Solicitation Number						
Page loaded on 08/25/2003 at 12:11:34 PM.						
Sol Num	PO	Type	Status	Title	Posted Date	Close Date
AD040061-A1	Pete Mahnke/Arizona State Procurement Office	RFP	Pending PO Approval	Solicitation Creation		09/02/2003
AD040061	Pete Mahnke/Arizona State Procurement Office	RFP	Published	Solicitation Creation	08/25/2003	09/02/2003

Note the two documents that now exist in the My Solicitations section. The original solicitation, AD040061 shows a status of Published. The Amendment, AD040061-A1 has a status of Pending PO Approval.

Once the amendment is published, the status of the original solicitation will reflect that it is Closed (Amendment Issued) and the amendment will reflect that it is Published.

The amendment, which includes the original solicitation and its amended portions, will then be the main document.

ADD OA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://spiritest.az.gov/Applications/SPIRIT/

Note that the Edit Icon is present. The document is in view mode. You will need to click on the edit icon to update, approve or publish the document.

ADOA
Arizona Department of Administration

Solicitation Creation
Solicitation #AD040061-A1
Pending PO Approval
Page loaded on 08/25/2003 at 12:11:40 PM.

Document Information

Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061-Contract TBD A1
Amendment:	Yes	Amend. #:	1
Created By:	Pete Mahnke/Arizona State Procurement Office	Date Created:	08/25/2003
Requestor:	Pete Mahnke/Arizona State Procurement Office	Gov't Entity:	Arizona State Procurement Office
Process Status:	Solicitation: Pending PO Approval	Status:	Pending PO Approval
Date Published:		Close Date:	09/02/2003 Type: RFP



Solicitation Information

PO Assigned: Pete Mahnke/Arizona State Procurement Office
PM Assigned: Rex Martin/Arizona State PA Katherine

Help
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ASPO

Start **Novell-delivered Applicati...** **ADD OA: SPIRIT - Autom...** **Internet** **12:17 PM**

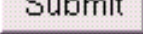
Note that the Edit Icon  is present. The document is in view mode. You will need to click on the edit icon  to update, approve or publish the document.

For the sake of the manual, we will assume the customer made no changes and that all was in agreement.

Click on the Edit Icon 

Once in edit mode scroll to the bottom of the window.

Your comments to the customer and theirs in return to you are in the Solicitation Review Comments window. Note that they will not be viewable by the supplier.

To publish the amendment, change the status to Publish and click on the  button.

My Solicitations **By Solicitation Number**

Page loaded on 08/25/2003 at 12:12:20 PM.

Sol Num	PO	Type	Status	Title	Posted Date	Close Date
AD040061-A1	Pete Mahnke/Arizona State Procurement Office	RFP	Published	Solicitation Creation	08/25/2003	09/02/2003
AD040061	Pete Mahnke/Arizona State Procurement Office	RFP	Closed (Amendment Issued)	Solicitation Creation	08/25/2003	09/02/2003

The original solicitation status has changed, as well as that of the amended document, which is now the active document.

Solicitation Tabulation

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://spirittest.az.gov/Applications/SPIRIT/SR.nsf>

Prior to the close of a solicitation we often check the bid tab to see if any suppliers have responded to a solicitation to get a feel for the interest and what work may be ahead. In the Related Documents\Information section at the bottom of a published solicitation is a Tabulation. Clicking on the View link will reveal basic information regarding proposals

Home Logout
You are logged in as:
Pete Mahrke

Requisitions
Solicitations
My Solicitations
All Solicitations
Proposals
Evaluations
Contracts
Other
Search

Related Documents\Information (For Internal Use Only)

1. Amendment(s)	Create	View
2. Tabulation	Create	View
3. Proposals	-----	-----
4. Evaluation(s)	-----	-----
5. Proposal Evaluation Reports	-----	-----
6. Solicitation Evaluation Report	-----	-----
7. Tabulation	-----	-----
8. Contract	-----	-----

Solicitation Review Comments

Approvals

PO:	Pete Mahrke/Arizona State Procurement Office	08/25/2003 11:51:57 AM
Customer:	Pete Mahrke/Arizona State Procurement Office	08/25/2003 11:50:34 AM

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<https://spirittest.az.gov/Applications/SPIRIT/PRO.nsf/Proc?Open&Login&Action=TabSol1?Open&DocNum=ADSM-SQNR&Login>

ADOA: SPIRIT - Autom...

Internet 12:08 PM

Prior to the close of a solicitation we often check the bid tab to see if any suppliers have responded to a solicitation to get a feel for the interest and what work may be ahead. In the Related Documents\Information section at the bottom of a published solicitation you will click on 2. Tabulation. Clicking on the [View](#) link will reveal basic information regarding proposals

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://spirittest.az.gov/Applications/SPIRIT/SR.nsf>

SPIRIT
Automated eProcurement System

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SPIRIT: Tabulation
AD040061
Page loaded on 08/25/2003 at 12:02:27 PM

Proposals
AD040061 - Solicitation Creation

Supplier	Proposal #	Date Submitted
Joe Azspo Test	ADSM-5QRQAC	Draft

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Internet 12:08 PM

At the SPIRIT: Tabulation you can see that one supplier has begun a Draft of their proposal to the solicitation. Once the supplier is done with their proposal the status will be the date the supplier submitted as Complete.

To return to the solicitation click on your browser back button

Solicitation Evaluation

- Background Information** This topic includes the following:
- Evaluation Form generation
 - Proposal View Orientation

Beginning the Evaluation Process

Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)	Create	View	Pending
2. Clarification Request	-----	-----	Not Yet Required
3. Proposal Evaluation Report	-----	-----	Pending
4. Supplier References Questionnaire	-----	-----	Pending
5. Supplier Meeting Request(s)	-----	-----	N/A
6. Negotiations	-----	-----	Not Yet Required
7. BAFO Request	-----	-----	Not Yet Required

To begin an evaluation the evaluator enters the proposal(s) to be evaluated and scrolls to the "Items To Compete" section at the bottom of the screen

The evaluator will be unable to begin an evaluation until he or she has created and accepted the "Conflict of Interest" statement.

1. Evaluation(s) ([Printable Eval COI](#)) – the evaluator must click on the "Create" link (highlighted in the image above), the statement will open in a separate window. At that point the evaluator has the option of "accepting" or "rejecting" the statement. If rejected, he or she can go no further. If accepted, the system generates the evaluation form for that proposal. This action must be repeated for each proposal to a solicitation.

To get to the evaluation form after saving it as a "Draft" the evaluator must click on the "View" link located in the "Items To Complete" section next to where the "Create" link was for the form.

Evaluation Criteria Key	
Evaluation Criteria Proposal	Max Points
C1. Conformance to Terms & Conditions and to Scope of Work	400
C2. Methodology	300
C3. Key Personnel/Qualifications	200
C4. Cost	100

Evaluator	Status	Total	C1	C2	C3	C4
evaluator/az.gov	Draft	0	0	0	0	0

The evaluator then clicks on his name link to open the evaluation form.

The evaluator also has links to view the "Evaluation Criteria" and "Proposal" available on this screen as well

The evaluator must click on the "edit" icon  if s/he has generated the form and save it as "Draft."

Evaluation		?
Schedule		
Evaluation Due Date:	07/01/2004	
Evaluation Meeting:	07/01/2004	
Clarifications:	07/01/2004	
Clarifications Due Date:	07/01/2004	
Instructions	Proposal Clarification Questions	

All important dates from the PP are included within each evaluation that an evaluator creates for a solicitation. These dates are listed under the "Evaluation Schedule." The dates listed are not tracked by the Spirit System, however, if any dates are not met, the PO can list these issues in the PP, which is still available for notes in the "Comments" window.

The "Clarification Questions" link is utilized by the Evaluator for the creation of questions that may arise during the evaluation, that require a response from the "Offeror." The "Evaluator" clicks on the link to create the form, so that the questions can be recorded. Once complete, they are forwarded to the PO, so that a "Clarification Questionnaire" can be created and submitted to the "Offeror" if necessary.

The Evaluator can click on the "Proposal" link to view the "Proposal" from the "Evaluation Form." We will assume the "Proposal" link was clicked on, so that we can cover some proposal view orientation.

Proposal View Orientation

The screenshot displays the SPIRIT Automated eProcurement System interface within a Microsoft Internet Explorer browser window. The address bar shows the URL: https://spirittest.az.gov/Applications/SPIRIT/SR.nsf. The page header includes the SPIRIT logo and the ADOA (Arizona Department of Administration) logo. A navigation menu on the left lists options: Home, Logout, Solicitations, Proposals, Evaluations, My Evaluations, All Evaluations, My Eval Report (Pro), Contracts, and Search. The main content area displays details for Proposal #ADSM-5QRQAC, which is marked as 'Complete'. The page was loaded on 09/05/2003 at 03:51:59 PM. The 'Proposal Information' section contains a table with the following data:

Proposal #:	ADSM-5QRQAC	Status:	Complete
Is BAFO?	No	BAFO #:	0
Created By:	Joe Azspo/Joe Azspo Test	Supplier Name:	Joe Azspo Test
Date Created:	08/25/2003	Date Due:	09/02/2003 03:00 PM
Modified By:	Joe Azspo/Joe Azspo Test	Date:	08/25/2003 12:19 PM
Total Price:	\$ 99,950.00	Modified:	08/25/2003 12:19 PM
		Date Submitted:	08/25/2003 12:19 PM

Below the proposal information, the 'Solicitation General Information' section is displayed:

Title	Solicitation Creation		
Solicitation Number:	AD040061-A1	Solicitation Type:	RFP
Procurement Officer:	Pete Mahnke/Arizona State Procurement Office		

Take a moment to note the data available in the "Proposal Information" section.

Proposal # = indicates the "proposal number" generated by the system when the "supplier" initiated their "Proposal." Its "Status" of Complete is recorded to the right.

Is BAFO? = indicates whether or not this is a "BAFO" proposal and BAFO # indicates what BAFO round it is.

Created By: and Supplier Name: = indicates the supplier and links back to their contact information.

Date Created: = is the date the supplier initiated their "proposal."

Date Due: = refers to the solicitation.

Modified By: and Date Modified: = indicate who at Joe Azspo Test initiated the "proposal" and who and when the last person from their company made any changes prior to submitting the proposal as complete.

Total Price: and Date Submitted: = indicates the total price offered and the date that the proposal was submitted as complete.

ADOA: SPIRIT - Automated eProcurement System

File Edit View Favorites Tools Help

Address <https://spirittest.az.gov/Applications/SPIRIT/SR.nsf>

SPIRIT
Automated eProcurement System

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Home Logout
You are logged in as:
evaluator

Solicitations
Proposals
Evaluations
My Evaluations
All Evaluations
My Eval Report (Pro)
Contracts
Search

Help
Change Password

Date Created:	08/25/2003	Date Due:	09/02/2003 03:00 PM
Modified By:	Joe Azspo/Joe Azspo Test	Date Modified:	08/25/2003 12:19 PM
Total Price:	\$ 99,950.00	Date Submitted:	08/25/2003 12:19 PM

Solicitation

General Information

Title	Solicitation Creation		
Solicitation Number:	AD040061-A1	Solicitation Type:	RFP
Procurement Officer:	Pete Mahnke/Arizona State Procurement Office		
Conference Location:	State Procurement Office	Conference Date:	09/01/2003 10:00 AM

Description
Solicitation creation

Amendment Information
This amendment is issued in order to a one additional Line Item to the Price Sheet. All other Terms and Conditions remain unchanged.

Clauses
[Special Instructions](#)

Done

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom...

Internet 3:59 PM

Take a moment to note the information available in the "General Information" section. All the information located here is in reference to the solicitation.

Note: Solicitation Number is a link back to the solicitation itself for reference. This allows the evaluator to view the solicitation and its attachments and to follow any links available in that document i.e. requisition, PP etc..

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://spiritest.az.gov/Applications/SPIRIT/SR.nsf>

SPIRIT
Automated eProcurement System

ADOA
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Home **Logout**
You are logged in as:
evaluator

Solicitations
Proposals
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My Evaluations
All Evaluations
My Eval Report (Pro)
Contracts
Search

Help
Change Password

Officer:
Conference State Procurement Office **Conference** 09/01/2003
Location: **Date:** 10:00 AM
Description
Solicitation creation
Amendment Information
This amendment is issued in order to a one additional Line Item to the Price Sheet. All other Terms and Conditions remain unchanged.
Clauses
[Special Instructions](#)
[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

To Do List
Initially Required Items

Item	Status
1. Offer	Complete
2. Price Sheet	Complete
3. Questionnaire	Complete
4. Insurance	N/A

Done

Start

Novell-delivered Applicati...

ADOA: SPIRIT - Autom...

Internet

3:59 PM

The Special Instructions to Offerors, Special Terms and Conditions, Uniform Instructions and Uniform Terms and Conditions are readily available for reference through their links.

To Do List

To Do List			
Initially Required Items			
Item			Status
1. Offer	-----	View	Complete
2. Price Sheet	-----	View	Complete
3. Questionnaire	-----	View	Complete
4. Insurance	-----	View	N/A
5. Bid Bond	-----	View	N/A
6. Performance Bond	-----	View	N/A
Potentially Required In the Future			
1. Clarification Response	-----	-----	Not Yet Required
2. Negotiations	-----	-----	Not Yet Required
3. BAFO	-----	-----	Not Yet Required

To Do List

- 1. Offer** = (203) clicking on "View" allows the evaluator to view that document.
- 2. Price Sheet** = clicking on "View" allows the evaluator to view the pricing offered.
- 3. Questionnaire** = clicking on "View" allows the evaluator to view the suppliers answers to questions posed in the solicitation.
4. Insurance, 5. Bid Bond and 6. Performance Bond are not necessary to the evaluation. Clicking on the "View" links for these opens the documents as they appear in the original solicitation. These documents will be submitted a hard copies to the State Procurement Office, to then be scanned and attached the appropriate suppliers proposal.

Potentially Required In the Future

- 1. Clarification Response:** the Clarification Response is based upon questions the Evaluators may have regarding a specific proposal. The Evaluators type any questions they may have in their Clarification Questions window and save their evaluation as "pending clarifications. The PO, if necessary generates a "Clarification Questionnaire" using the evaluators questions and submits them to the specific supplier(s). Once the supplier completes the questionnaire, the status of the Clarification Response will be "Complete" and the evaluator(s) will be able to view them and continue with their evaluation.
- 2. Negotiations:** if necessary this form will be created by the PO with the assistance of the evaluators. It will then be submitted to the supplier(s).
- 3. BAFO:** if necessary this form will be created by the PO with the assistance of the evaluators based upon their evaluations and the "Proposal Evaluation Report (PER).

Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)	-----	View	Pending
2. Clarification Request	-----	-----	Not Yet Required
3. Proposal Evaluation Report	-----	-----	Pending
4. Supplier References Questionnaire	-----	-----	Pending
5. Supplier Meeting Request(s)	-----	-----	N/A
6. Negotiations	-----	-----	Not Yet Required
7. BAFO Request	-----	-----	Not Yet Required

Items To Complete (For Internal Use Only)

1. Evaluation(s): Initially this only has a "Create" link for evaluators. When the evaluator clicks on "Create" the "Evaluator Conflict of Interest" statement opens allowing for the evaluator to accept its language. The evaluation can then begin on that particular proposal. Once begun the "Create" link is no longer available and the "View" link is used for access for the evaluator for their evaluation. The evaluator can also access their evaluation through the "Evaluations" tab on the main menu.

2. Clarification Request: Once the evaluator has submitted clarification questions to the PO to generate the "Clarifications Questionnaire," the questionnaire is then accessible by the evaluator by clicking on the "View" link when active. The questionnaire as completed by the supplier(s) will be viewable in the previous section covered.

3. Proposal Evaluation Report (PER): When the evaluator(s) have completed their evaluation(s), the PO will create this report. The PER combines the evaluations of all evaluators into one report. The evaluator(s) must then click on the "View" link that will be present here to view and "approve" the report. Evaluation/award cannot continue without the evaluator(s) approval of this report.

4. Supplier References Questionnaire: this form allows the PO to create a questionnaire that can then be e-mailed or faxed from the Spirit system to the references the supplier(s) submitted.

5. Supplier Meeting Request(s): this form generated by the PO sends an e-mail from the Spirit system to the appropriate supplier(s) regarding any necessary meetings during the evaluation.

6. Negotiations: this form generated by the PO will be created with the assistance of the evaluator(s). The form will be viewable from this area once completed.

7. BAFO Request: much like the amendment, the Spirit system generates a duplicate of the solicitation including the supplier(s) proposal. The BAFO includes a BAFO questionnaire with the duplicate so that the supplier(s) knows what specifically to address. It also allows the supplier(s) to make any changes they feel is necessary in an attempt to address the BAFO. The BAFO will be viewable by clicking on the "View" link that will appear here. The supplier(s) response is viewable by the evaluator from the section described previously.

Payment Terms			
Contract Payment Terms:	net 30	Contract Delivery:	10 A.R.O. Days


Confidential Information	?

Attachments	?
Stammer II.doc	

Payment Terms as offered by the supplier are viewable, as well as the **Confidential Information**.

If the supplier(s) submit anything that they feel is confidential, they will have to cut it from its original document and paste it in this window that will be available to them. The supplier(s) will have to reference where exactly the confidential material comes from. This information is viewable to the evaluator(s), the PO, PM, and PA as well as the supplier(s) that submitted it.

Clicking on the "suppliers" **attachments** to their proposal will open them. There is no limit to the number of attachments a supplier may submit with their proposal.

Close any attachment(s) by clicking on the windows 

Viewing Offer & Acceptance, Price Sheet and Questionnaire

To Do List

Item	Status
1. Offer	Complete
2. Price Sheet	Complete
3. Questionnaire	Complete
4. Insurance	N/A
5. Bid Bond	N/A
6. Performance Bond	N/A
Potentially Required In the Future	
1. Clarification Response	Not Yet Required
2. Negotiations	Not Yet Required
3. BAFO	Not Yet Required
Other	
4. Solicitation Evaluation	N/A

If you are viewing a proposal in Spirit scroll back up the proposal to view the Offer, Price Sheet and Questionnaire in the "To Do List."

1. Offer

ADOA: SPIRIT - Automated eProcurement

SPIRIT: Offer - Microsoft Internet Explorer

Small Business Status: _____

Tax Information

Arizona Transaction (Sales)	N/A
Privilege Tax License No.	
Federal Employer Identification No.	563794213

Location Information

Company Name	Joe Azspo Test
Address:	1211 W Monkey St Suite 100 St Phraxas, AZ 85555-1236

Clarification Information

Name:	Joe Azspo
Phone:	5555555555
Fax:	5555555555

Electronic Signature

TO DO LIST

Item	Status
1. Offer	Complete
2. Price Sheet	Complete
3. Questionnaire	Complete
4. Insurance	N/A
5. Bid Bond	N/A
6. Performance Bond	N/A
Potentially Required In the Future	
1. Clarification Response	Not Yet Required
2. Negotiations	Not Yet Required
3. BAFO	Not Yet

Left Sidebar:

- Home
- Logout
- You are logged in as: evaluator
- Solicitations
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- Evaluations
- My Evaluations
- All Evaluations
- My Eval Report (Pro)
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Bottom Taskbar:

Start | Novell-delivered Applicati... | ADOA: SPIRIT - Automat... | SPIRIT: Offer - Micros... | 3:59 PM

Click on "View" to open the Offer and Acceptance form. This form contains all the information that is on the present form we use (203). It also will contain the individual that should be contacted for issues pertaining to the proposal and their contact information.

Click on the "Close" button at the bottom of the form to exit the Offer and Acceptance.

2. Price Sheet

ADOA: SPIRIT - Automated eProcurement System
The "Price Sheet" will open. You may scroll to the right to see more detail, however, clicking on the "Line Item" number link will open that particular line item to allow the viewing of it and its details.

Items

LI #	Cm Code # Cm Code Item #	Commodity Code Description Commodity Code Item Description	Manufacturer	Pricing	Qty	%	Unit Price	Total Price
1	0070-0020 0070-0020-0002	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) All Terrain	Fleebell	FP	1		\$ 7,800.00	\$ 7,800.00
2	0070-0020 0070-0020-0001	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) Motor Scooters	Fleebell	FP	10		\$ 9,215.00	\$ 92,150.00
							Total: \$ 99,950.00	

3. Questionnaire ----- [View](#) Complete

4. Insurance ----- [View](#) N/A

5. Bid Bond ----- [View](#) N/A

6. Performance Bond ----- [View](#) N/A

Potentially Required In the Future

1. Clarification Response ----- ----- Not Yet Required

2. Negotiations ----- ----- Not Yet Required

3. BAFO ----- ----- Not Yet

Help
Change Password

javascript:viewPS('ADSM-SQRQAC', 'Pro', 'No')

ADOA: SPIRIT - Automate... SPIRIT: Price Sheet - ...

3:59 PM

The "Price Sheet" will open. Clicking on the "Line Item" number link (circled above), will open that particular line item to allow the viewing of it and its details.

Proposal Line Item
Proposal # AD5M-5QRQAC
Line Item # 1
 Page loaded on 09/05/2003 at 03:53:00 PM.

Line Item # 1
 0070-0020 Motor Scooters and Trucksters, Electric Powered
 (Including Golf Carts and All Terrain Vehicles)
 All Terrain
 0002

Grp	Pricing	Qty	UOM	%	Unit Price	Ext Price
----	FP	1	Each	N/A	\$ 7,800.00	\$ 7,800.00

Other:
 Manufacturer: Fleebeil
 Model: Ringding Dong II

[Close](#)

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6. Performance Bond			
Potentially Required In the Future			
1. Clarification Response			Not Yet Required
2. Negotiations			Not Yet Required
3. BAFO			Not Yet

By Line Items

Pricing	Qty	%	Unit Price	Ext Price
FP	1		\$ 7,800.00	\$ 7,800.00
FP	10		\$ 9,215.00	\$ 92,150.00
Total:				\$ 99,950.00

Click on the "Line Item" number link to view the details of the proposal to the solicitation price sheet.

In this Line Item, the PO requested the Unit Price, Manufacturer and Model.

Click on the [Close](#) button or the windows X to return to the proposal price sheet

Once closed, we click on the second line item number link

Proposal Line Item
Proposal # AD5M-5QRQAC
Line Item # 2
 Page loaded on 09/05/2003 at 03:53:06 PM

Line Item # 2
 0070-0020 Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)
 0070-0020- Motor Scooters
 0001

Grp	Pricing	Qty	UOM	%	Unit Price	Ext Price
----	FP	10	Each	N/A	\$ 9,215.00	\$ 92,150.00

Other
 Manufacturer: Fleebeil
 Model: Ringding Dong Mach I
 Catalog #: SPOJOE Road/Dirt/Water vol. 36
 Catalog URL: <http://WWW.SPOJOETOYS.COM>
 Catalog Date: Fall '03
 Part #: N/A

6. Performance Bond ----- [View](#) N/A
 Potentially Required In the Future

1. Clarification Response	-----	-----	Not Yet Required
2. Negotiations	-----	-----	Not Yet Required
3. BAFO	-----	-----	Not Yet

By Line Items

Pricing	Qty	%	Unit Price	Ext Price
FP	1		\$ 7,800.00	\$ 7,800.00
FP	10		\$ 9,215.00	\$ 92,150.00
Total:				\$ 99,950.00

The PO requested manufacturer and model.

Catalog # and Catalog URL; if you recall that during the solicitation drafting, the Catalog URL will allow users of the contract to follow the link within a given supplier(s) contract to the products on contract at the suppliers website.

Catalog Date and Part # were also requested.

Close this line item as you did the previous. Once back at the "Proposal Price Sheet" click on the close button.

3. Questionnaire

Answers to questions posed to the supplier(s) in the solicitation will be viewable here.

Questionnaire
Solicitation # AD040061
Page loaded on 09/05/2003 at 03:52:47 PM.

Questions

Instructions
Answer
Questions

1. How do you...?
Under normal conditions we...

2. Completely identify all exceptions that have been taken to the specifications.
None taken.

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[Close](#)

Question	Answer	Status
3. Questionnaire		Complete
4. Insurance		N/A
5. Bid Bond		N/A
6. Performance Bond		N/A
Potentially Required In the Future		
1. Clarification Response		Not Yet Required
2. Negotiations		Not Yet Required
3. BAFO		Not Yet

Click on the "View" link to open the "Questionnaire" response. Answers to questions posed to the supplier(s) in the solicitation will be viewable here.

Click on the "close" button or windows X to return to the proposal.

NOTE: In some instances, the combination of amount

The detail involved in the evaluation has obviously been simplified for the purposes of instruction.

After viewing the necessary documents, the evaluator can now return to their evaluation form to complete the evaluation.

Scroll down to "The Items To Complete (For Internal Use Only) section"

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5. Bid Bond	-----	View	N/A
6. Performance Bond	-----	View	N/A
Potentially Required In the Future			
1. Clarification Response	-----	-----	Not Yet Required
2. Negotiations	-----	-----	Not Yet Required
3. BAFO	-----	-----	Not Yet Required
Other			
1. Solicitation Tabulation	-----	View	N/A
Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)	-----	View	Pending
2. Clarification Request	-----	-----	Not Yet Required
3. Proposal Evaluation Report	-----	-----	Pending
4. Supplier References Questionnaire	-----	-----	Pending
5. Supplier Meeting Request(s)	-----	-----	N/A
6. Negotiations	-----	-----	Not Yet Required

Done

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom...

Internet 4:00 PM

Click on the "View" link to open the evaluation form draft. The evaluator can continue from where s/he left off.

Evaluations By Evaluator
Proposal # ADSM-5QRQAC
 Page loaded on 09/05/2003 at 03:53:25 PM.

Evaluation Criteria Key

Evaluation Criteria	Proposal	Max Points
C1. Conformance to Terms & Conditions and to Scope of Work		400
C2. Key Personnel/Qualifications		300
C3. Methodology		200
C4. Cost		100

Evaluator	Status	Total	C1	C2	C3	C4
evaluator/az.gov	Draft	100	0	0	0	100


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Clicking on the "Evaluation Criteria" link will open a view of the evaluation criteria as listed below in the "Evaluation Criteria Key."

Clicking on the "Proposal" link will return the evaluator to the suppliers proposal (we used this link to enter the proposal for the review). A link back to the proposal is also available from the evaluation form.

To access their evaluation form the evaluator must click on their name link.

Note: C4 100 is the score given to the cost as offered by the supplier. This score is generated by the Spirit system and can be edited by the PO when drafting the Proposal Evaluation Report (PER).

When an evaluator or any user returns to any draft form they have created, it will be in view mode only. You must click on the "edit"  icon to make any changes.

Once in "edit" mode, scroll to the bottom of the screen to the evaluation criteria. Within each criterion is the evaluators comments and points score. The PO has access to fields to allow for the input of a more merged and coherent language for the PER.

Criteria (Points)	Pts	Max Pts
1. Conformance to Terms & Conditions and to Scope of Work		400
Categories:		
Strengths	Need Clarification	
Weaknesses		
2. Key Personnel/Qualifications	250	300
Categories:		
Strengths	Good to Better	
Weaknesses		
3. Methodology		200
Categories:		
Strengths		
Weaknesses		
4. Cost	---	100
Categories:		
Strengths		
Weaknesses		
Totals:	---	1000

The "Evaluator(s)" enter any relevant remarks regarding the suppliers proposal to the solicitations evaluation criteria. These may be what s/he considers "Strengths" or "Weaknesses."

This evaluator may be unclear on a number of issues with regard to the suppliers conformance to the Terms and Conditions and to the Scope of Work. He will make notes to that affect and not consider what the scoring for this category might be until the issue is clarified. If an evaluator needs clarification s/he clicks on the "Clarification Questions" link above and types in any questions. Once the questions are typed in, the evaluator would submit the evaluation to the PO using the "Pending Clarifications" status. This will allow the evaluator to return later to evaluate other portions of the proposal as well as return to complete the evaluation once the supplier has responded to the "Clarification Questionnaire," that the PO will draft and submit to them.

In this instance, the evaluator is unclear as to a couple of issues with regard to the suppliers response to "Criteria 1." He will make comments to that affect with the intention of creating "clarification questions," so that he can continue the evaluation of that criterion at a later time. These questions will be entered by clicking on the "Clarification Questions" link.

The evaluator having read the proposal may enter evaluation notes on the other categories, as they may be edited anytime prior to their submitting the "evaluation form" as complete.

He will also enter a score. Remember that this document is a draft until submitted to the PO as complete. The score entered at this point does not need to be the final score he may enter.

The system will average the scores of all evaluators, which the PO, when creating the Proposal Evaluation Report (PER) can alter if deemed necessary.

Comments for each of the criteria will have to be entered. For each category, you may have selected, "Strengths" and "Weaknesses" as this evaluation criteria does. A comment will have to be entered in at least one for each of the criteria, including cost. The Spirit system calculates the "Cost" score, however, with cost, as well as the others, the PO can override the score.

Clarification Questions

Now that the evaluators point scores and comments have been input, we will scroll back up to the "Clarification Questions" link and enter any clarification questions.

Click on the [Clarification Questions](#) link.

If the evaluator is unclear as to the meaning of something in a proposal, the evaluator would click on the "Clarification Questions" link to type the issues/questions. The PO can then generate a "Clarification Questionnaire" to submit to the supplier if warranted.

Evaluator Clarification Questions
Proposal # ADSM-5QRQAC
 Page loaded on 09/05/2003 at 03:53:41 PM.
 * = Required Field

Evaluator Proposed Clarification Questions	
1	

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2. Key Personnel/Qualifications		250	300
Categories:			
Strengths	Good to Better		
Weaknesses			

3. Methodology		100	200
Categories:			
Strengths	Approach is lacking...		
Weaknesses			

4. Cost		---	100
Categories:			
Strengths			
Weaknesses			

If the evaluator has more than one question, s/he may click on the "ADD" button to create more fields for additional questions. This functionality works like the Questionnaire in the solicitation drafting process. Although, this questionnaire cannot be saved as "draft." The evaluator will have to note questions then type them or paste them in all at once.

The evaluator types the questions in this window. Use the "Up" and "Down" arrow buttons to rearrange the questions if necessary. As in the image above, only a "Down" arrow is available. Once other question fields are added, the "Up" arrow will be available as well.

Clicking on the [Add](#) button adds more question fields. You may use the numeric drop down menu to add more than one at a time. Leave any blank question fields at the end of the form so that they do not appear to other people (PO) viewing them.

To repeat. If the evaluator decided not to use an added question field, they would just leave it blank. Also, if a PO or another evaluator could answer the clarification question(s), the PO would not need to include all questions submitted by the evaluator(s).

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Once complete the evaluator clicks on the "Submit" button. The PO will then be able to access the questions and include those that s/he deems necessary.

Evaluator Clarification Questions

Proposal # ADSM-5QRQAC

Page loaded on 09/05/2003 at 03:53:52 PM.

• = Required Field

Proposed Clarification Questions

Add 1

1	What is the...	
2	It's not clear if...	

Submit Cancel Reset

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2. Key Personnel/Qualifications

250 300

Categories:

Strengths Good to Better

Weaknesses

3. Methodology

100 200

Categories:

Strengths Approach is lacking...

Weaknesses


4. Cost

--- 100

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javascript:viewClarification(document.forms[0].DocNumClar.value, document.forms[0].IsDocBeingEdited.value)

Start Novell-delivered Applicati... ADOA: SPIRIT - Automat... SPIRIT: Evaluator Clari... 4:01 PM

Once complete the evaluator clicks on the  button. The PO will access the questions when the evaluator submits their evaluation form as Pending Clarifications.

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Categories:

Strengths	Good to Better	
Weaknesses		
3. Methodology		100 200
Categories:		
Strengths		
Weaknesses	Approach is lacking...	
4. Cost		100
Categories:		
Strengths	Not horrible pricing	
Weaknesses		
Totals:	---	1000

Save as: ☐ Draft ☒ Pending Clarifications ☐ Complete

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Done

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This evaluator has gone as far with his evaluation as he can at this point. The "status" for the evaluation for this proposal can be either saved as "Draft" or "Pending Clarifications."

As the evaluator needs clarification(s), he will set it as "Pending Clarifications" so that the PO will be notified of the existence of "clarification questions." If necessary, the PO will create a "Clarification Request."

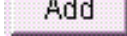
Click on the "Submit" button to complete this stage of the evaluation for this proposal.

Once submitted you will be returned to the proposal.

Evaluation

Clarification Request

In drafting the Clarification Request the PO can go into each individual evaluation form and view the questions as posed by the evaluator(s). Or the PO can begin the draft and view the questions as the request is being drafted.

Clicking on the  button adds more question fields. You may use the numeric drop down menu to add more than one at a time. Leave any blank question fields at the end of the form so that they do not appear to other people (PO) viewing them.

To repeat. If the evaluator decided not to use an added question field, they would just leave it blank. Also, if a PO or another evaluator could answer the clarification question(s), the PO would not need to include all questions submitted by the evaluator(s).

My Evaluations
By Proposal Number

Page loaded on 09/19/2003 at 01:42:52 PM.

Proposal Number	Supplier	Evaluator	Status
AD040061-A1 - Solicitation Creation			
ADSM-5QRQAC	Joe Azspo Test	eval uator/az.gov	Pending Clarifications

At the "My Evaluations By Proposal Number" screen, click on the appropriate proposal to the solicitation being evaluated. In this instance [ADSM-5QRQAC](#). The previous action opened the "Evaluation Form" that contains the "clarification questions." Note that the status of the evaluation is in red at the top center of the evaluation form.

Evaluation for Joe Azspo Scooters (AD040167)
Proposal # ADSM-5YULKU
Pending Clarifications

Page loaded on 06/21/2004 at 09:48:19 AM.

The POs view of the evaluation form of another evaluator will always be in "view" mode to the PO. It is during the drafting of the "Proposal Evaluation Report" (PER), that the PO will be able to make changes to the language used by the evaluator for that report. The language changes however, will not change that which the evaluator typed in the evaluation form.

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Date Created:	09/05/2003	Date Submitted:	Office
---------------	------------	-----------------	--------

Evaluation ?

Schedule

Evaluation Due	09/01/2003
Date:	
Evaluation Meeting:	09/01/2003
Clarifications:	09/01/2003
Clarifications	09/01/2003
Due Date:	

Instructions [Proposal](#) | [Clarification Questions](#)

Criteria (Points)	Pts	Max Pts
1. Conformance to Terms & Conditions and to Scope of Work		400

Categories:

Strengths	Need Clarification
Weaknesses	

Done
Start
Novell-delivered Applicati...
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4:04 PM

To view the clarification questions, click on the [Clarification Questions](#) link.

SPIRIT: Evaluator Clarification Questions - Microsoft Internet Explorer provided by ADDA LAN

Evaluator Clarification Questions
Proposal # ADSM-5YULKU
Page loaded on 06/21/2004 at 09:49:37 AM.

Evaluator Proposed Clarification Questions	?
1 What can we expect in the...	

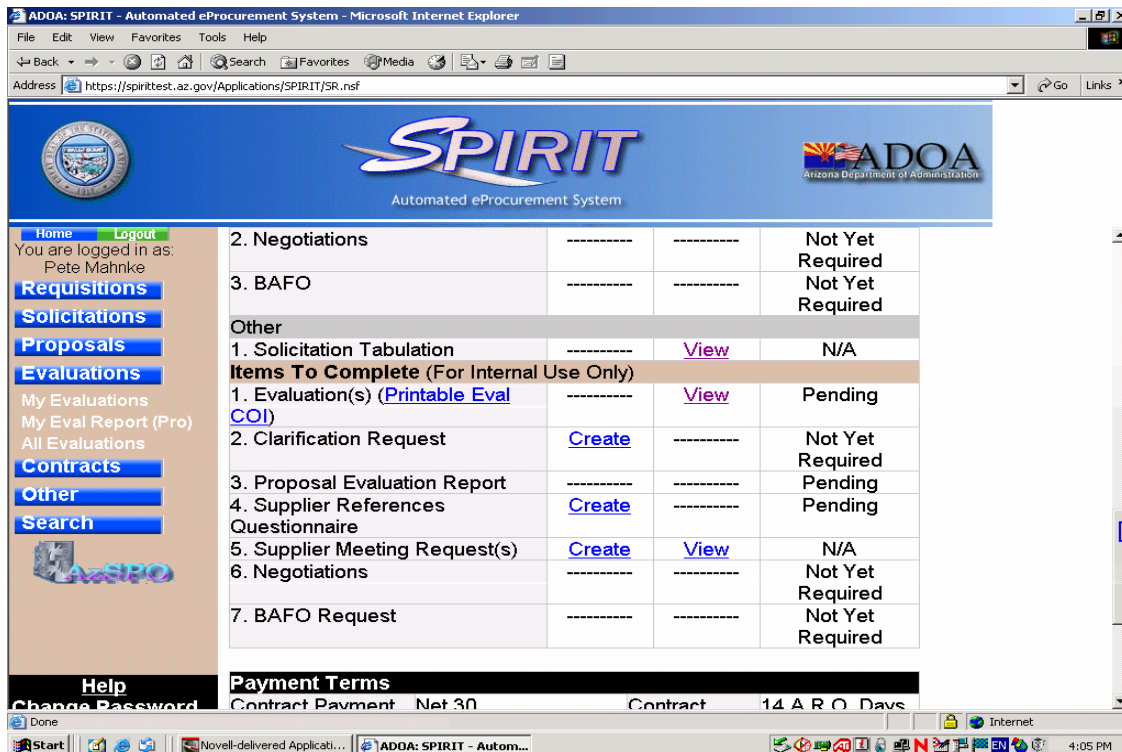
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Close

The PO can then read the clarifications the evaluator needs. The answer to the clarification questions may be apparent to the PO or another evaluator so that submittal of a request to the supplier would not be necessary. However, if a request is appropriate, the PO must return to the "Items To Complete" section of the proposal and create a "clarification questionnaire"

To close the window click on the  button or the windows X.

Either click on the proposals number link from My Proposals or after closing the clarification questions, click on the "Proposal" link to return to the proposal to create a "Clarification Request."



Items To Complete (For Internal Use Only)			
1.	Evaluation(s) (Printable Eval COI)	View	Pending
2.	Clarification Request	Create	Not Yet Required
3.	Proposal Evaluation Report		Pending
4.	Supplier References Questionnaire	Create	Pending
5.	Supplier Meeting Request(s)	Create View	N/A
6.	Negotiations		Not Yet Required
7.	BAFO Request		Not Yet Required

Payment Terms
 Contract Payment Net 30 Contract 14 A R O Days

Once in the proposal, scroll down the screen to the "Items To Complete" section

2. Clarification Request, click on the [Create](#) link (circled above).

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Clarification Request
Proposal # ADSM-5QRQAC
Page loaded on 09/05/2003 at 03:58:14 PM.
• = Required Field

Clarification Questions

Instructions

Add 1 Select

1

Save as: ☒ Draft ☐ Submit to Supplier for Completion

Submit Reset

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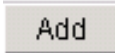
(1 item remaining) Downloading picture https://spirittest.az.gov/Applications/SPIRIT/PRO.nsf/Help2.gif?OpenImageResource... Internet

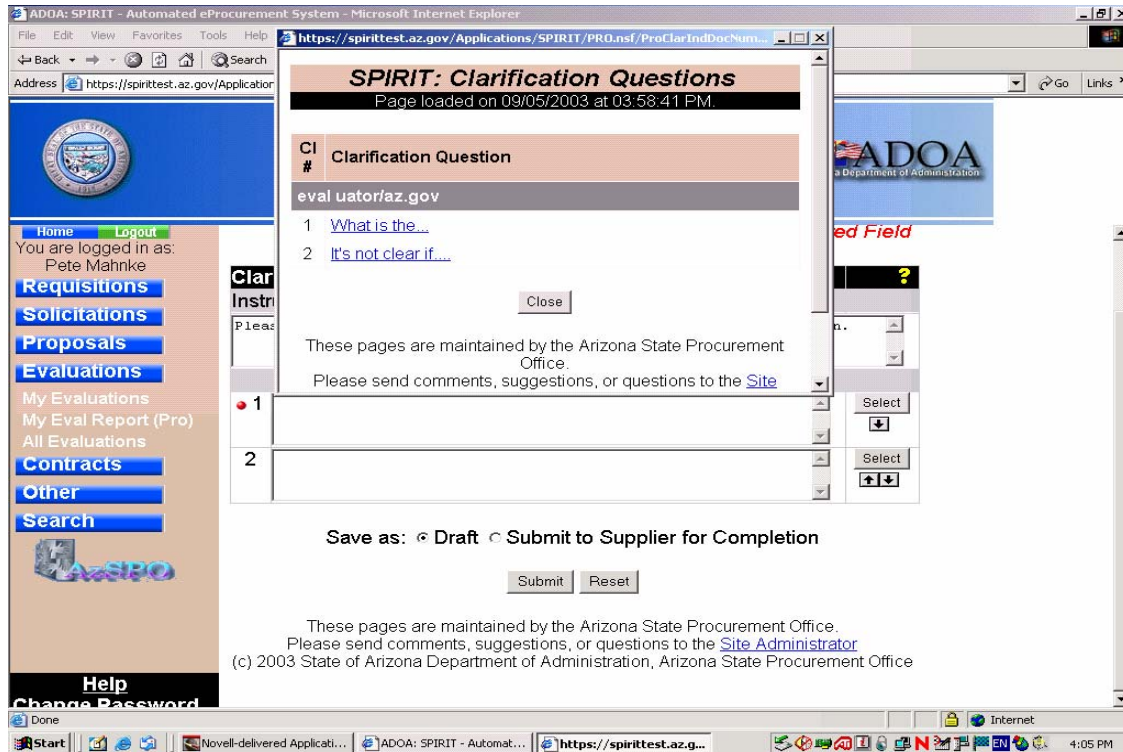
Start Novell-delivered Applicati... ADOA: SPIRIT - Autom... 4:05 PM

The “Clarification Request” has been generated. This request is like the other questionnaire based forms you will find throughout the procurement process in the Spirit System.

The PO must type instructions to the supplier for the request.

If additional question fields are necessary, the PO can include more by clicking on the

 button. To add more than one at a time select the appropriate number of questions from the numeric drop down menu to the buttons right.



The Spirit system has been programmed to allow the PO to select the question(s) from a form so that they do not need to be retyped. This functionality is much like the "question bank" used when creating a questionnaire when drafting a solicitation. The difference being that the PO is selecting from the questions as typed by the evaluator.

Click on the **Select** button to the right of a question field to open the SPIRIT: Clarification Questions window that contains the questions as written by the evaluator.

To select a question to include; click on the questions link. In the image exported from the demo, [What is the...](#) is the question selected

The question selected is now incorporated into the form. This question can be edited as appropriate.

To load the second question into the form click on the appropriate **Select** button. If you were to click on the select button for question number one (which already has a question), this new selection would replace the previous.

Rather than include a second question; it is left blank. This may be due to a bad question or that the PO or another evaluator knows the answer. Leaving the second question blank will exclude that field from the request. There will be no indication that this question ever existed.

NOTE: Had the PO included the second question s/he could have rearranged the order of the questions by utilizing the "Up" or "Down" arrows beneath the select button.

As the evaluation form for the second evaluator has a status of "draft" the PO clicks on the **Submit** button with the "clarification request" as draft to enable the inclusion of any questions from the second evaluator if submitted.

Regardless of the save as status selected, once submitted, you will be routed back to the proposal that you created the "Clarification Request" for.

Having received no additional questions from the second evaluator the PO returns to the proposal to submit the clarifications to the supplier. Had clarification questions been submitted by the second evaluator the PO would have repeated the steps taken previously. As the "Clarification Request" has been saved as "Draft," the PO would have returned to the previously created request. The second evaluators questions would have been added to the questions the first evaluator wrote. The PO would then have been able to add additional question fields and selected the questions to add to the "Draft" clarification request.

Potentially Required In the Future			
1.	Clarification Response	-----	Not Yet Required
2.	Negotiations	-----	Not Yet Required
3.	BAFO	-----	Not Yet Required
Other			
1.	Solicitation Tabulation	-----	N/A
Items To Complete (For Internal Use Only)			
1.	Evaluation(s) (Printable Eval COI)	-----	Pending
2.	Clarification Request	-----	Draft
3.	Proposal Evaluation Report	-----	Pending
4.	Supplier References Questionnaire	-----	Pending
5.	Supplier Meeting Request(s)	-----	N/A
6.	Negotiations	-----	Not Yet Required
7.	BAFO Request	-----	Not Yet Required

Return to the proposal that the "Clarification Request" was created for and scroll down to the "Items To Complete" section. Click on the [View](#) link for the "Clarification Request"

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Clarification Request
Proposal # ADSM-5QRQAC
Page loaded on 09/08/2003 at 02:05:37 PM.


Clarification Questions
Please answer these questions so that we can complete your evaluation.

1	What is the...
---	----------------

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As with all documents that have been previously begun, the request will be in view mode.

Click on the "edit"  icon to open the request in edit mode so that you can complete the form.

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Clarification Request
Proposal # ADSM-5QRQAC
Page loaded on 09/08/2003 at 02:05:40 PM.

• = Required Field

Clarification Questions
Instructions
Please answer these questions so that we can complete your evaluation.

1	What is the...
---	----------------

Save as: ☐ Draft ☒ Submit to Supplier for Completion

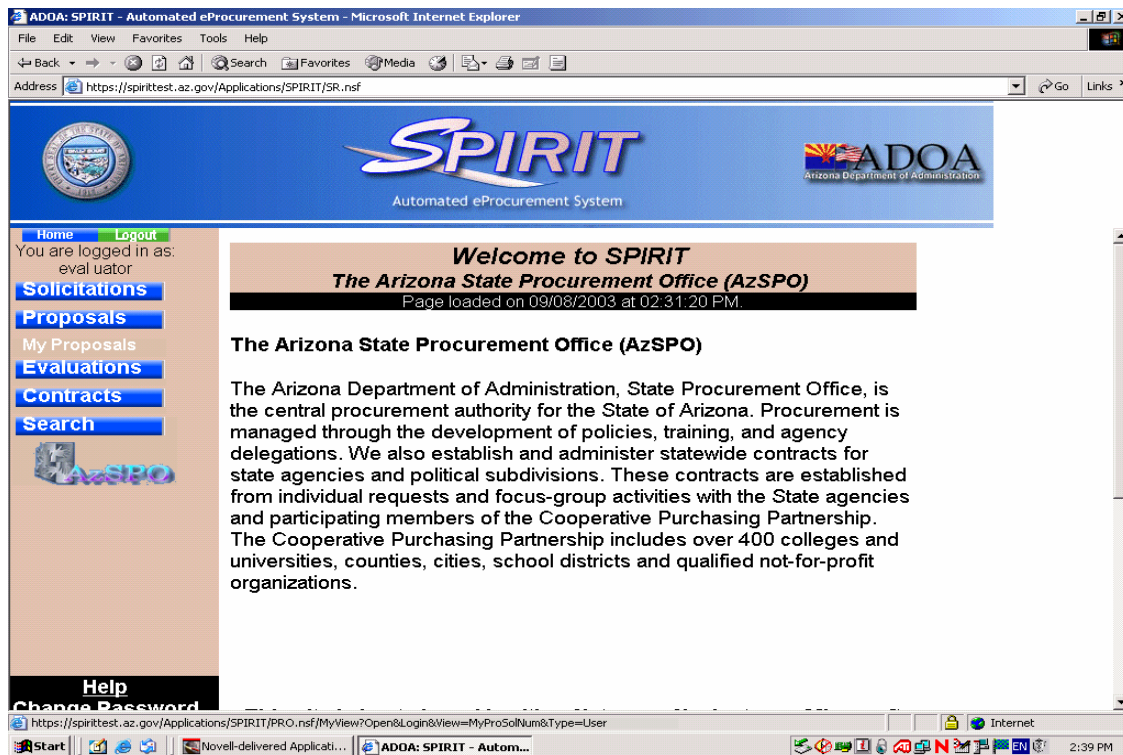
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Draft | Start | Novell-delivered Applicati... | ADOA: SPIRIT - Autom...

Note that the second question field that was unused is no longer present. Since no further question are necessary, change the status to "Submit to Supplier for Completion" and click on the Submit button. You are once again back at the proposal.

The "Clarification Request" is complete. The supplier will receive an e-mail notification alerting them to the existence of the request. Once they have addressed the request and submitted it, the PO will receive an e-mail from the Spirit System notifying them of the requests completion.

Clarification Response



At this point, the evaluator returns to address the suppliers response to the "clarification request."

Click on the **Proposals** tab.

Note: the user could also reach the proposal by clicking on the "Evaluations" tab.

Click on the **My Proposals** tab from the sub-menu.

My Proposals By Solicitation Number Page loaded on 09/08/2003 at 02:32:26 PM.				
Supplier	Proposal #	Type	Status	Created Date
AD040061-A1 - Solicitation Creation				
Grants Tombs	ADSM-5QRSVQ	RFP	Complete	08/25/2003
Joe Azspo Test	ADSM-5QRQAC	RFP	Complete	08/25/2003

ADSM-
5QRQAC

Click on the appropriate proposal number link [5QRQAC](#). Once in the proposal scroll down to the "Potentially Required in the Future" section where the "clarification response" from the supplier is accessed.

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To Do List

Initially Required Items			
Item			Status
1. Offer	-----	View	Complete
2. Price Sheet	-----	View	Complete
3. Questionnaire	-----	View	Complete
4. Insurance	-----	View	N/A
5. Bid Bond	-----	View	N/A
6. Performance Bond	-----	View	N/A
Potentially Required In the Future			
1. Clarification Response	-----	View	Complete
2. Negotiations	-----	-----	Not Yet Required
3. BAFO	-----	-----	Not Yet Required
Other			
1. Solicitation Tabulation	-----	View	N/A
Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)	-----	View	Pending
2. Clarification Request	-----	-----	Complete

Help
Change Password

javascript:viewQuestionnaire('ADSM-SR7SR5', 'No')

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom...

Internet 2:40 PM

The status is now "Complete" and the "View" link is available.

Click on the "View" link to access the response.

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Address: https://spirittest.az.gov/Applic...

SPIRIT: Clarification Response - Microsoft Internet Explorer

Proposal #: ADSM-5QRQAC Solicitation #: AD040061-A1

Date Created: 09/08/2003 Date Submitted: 09/08/2003 02:32 PM

Clarification Questions

Instructions
Please answer these questions so that we can complete your evaluation.

Questions
1. What is the...
The ... is ...

Attachments

[Supplier Attachment to clarification.doc](#)

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Item	Status	Completion Date
1. Commission Response	-----	-----
2. Negotiations	-----	-----
3. BAFO	-----	-----
Other		
1. Solicitation Tabulation	-----	View
Items To Complete (For Internal Use Only)		
1. Evaluation(s) (Printable Eval COI)	-----	View
2. Clarification Request	-----	Complete

Help
Change Password

Done Start Novell-delivered Applicati... ADOA: SPIRIT - Automat... SPIRIT: Clarification R... Internet 2:40 PM


The response opens with information regarding, which proposal, solicitation, the date the "clarification request" was created and the date the supplier submitted the response.

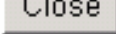
The instructions to the supplier, question(s) posed to the supplier and the suppliers response is located at the middle of the screen.

The form used for the suppliers response includes attachment functionality.

Open the attachment by clicking on its title link.

The attachment opens and can be saved outside the Spirit System if you desire.

To close the document, click on the windows .

To close the "clarification response" click on the  button or the windows X.

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3. BAFO

Other			Not Yet Required
1. Solicitation Tabulation		View	N/A
Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)		View	Pending
2. Clarification Request			Complete
3. Proposal Evaluation Report			Pending
4. Supplier References Questionnaire			Pending
5. Supplier Meeting Request(s)			N/A
6. Negotiations			Not Yet Required
7. BAFO Request			Not Yet Required

Payment Terms

Contract Payment	Net 30	Contract Delivery:	14 A.R.O. Days
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Internet
2:40 PM

Having read the response, the evaluator can then complete their evaluation form. Once all evaluation forms are completed, the PO can then create a "Proposal Evaluation Report" (PER) for each proposal. The report will combine all evaluators evaluations. If the PO finds that some of the evaluators comments could use a little sprucing up, s/he will be able to make those changes as s/he drafts the report. Once the reports are complete the evaluators and the PO will have to sign off on or approve the PER.

Scroll to the bottom of the screen to access the evaluation for this proposal.

Click on the [View](#) link to access the evaluation

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The "Evaluations By Evaluator" screen loads.

Evaluations By Evaluator
Proposal # ADSM-5QRQAC
 Page loaded on 09/08/2003 at 02:33:18 PM

Evaluation Criteria Key

Evaluation Criteria	Proposal	Max Points
C1. Conformance to Terms & Conditions and to Scope of Work		400
C2. Key Personnel/Qualifications		300
C3. Methodology		200
C4. Cost		100

Evaluator	Status	Total	C1	C2	C3	C4
evaluator@az.gov	Pending Clarifications	450	0	250	100	100

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Address: <https://spirittest.az.gov/Applications/SPIRIT/PRO.nsf/EvalDocNumProEvalOpen&Login&RestrictToCategory=ADSM-5QRQAC&Count=1000>

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The "Evaluations By Evaluator" screen loads.

Click on the evaluators name link to access the evaluation draft. In this instance we have been following the evaluation of Eval Uator evaluator@az.gov

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Evaluation for Joe Azspo Test (AD040061-A1)
Proposal # ADSM-5QRQAC
Pending Clarifications
 Page loaded on 09/08/2003 at 02:33:21 PM

Proposal Information

Proposal #:	ADSM-5QRQAC	Solicitation #:	AD040061-A1
Sol Title:	Solicitation Creation		
Supplier Name:	Joe Azspo Test		
Created By:	evaluator@az.gov	PO:	Pete Mahnke/Arizona State Procurement Office
Date Created:	09/05/2003	Date Submitted:	

Evaluation Schedule

Evaluation Due Date:	09/01/2003
----------------------	------------

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Address: <https://spirittest.az.gov/Applications/SPIRIT/PRO.nsf/8562edcfef09885e07256cc2005f992c/a237b936605a71ff07256d9800790eda?EditDoc>

Start Novell-delivered Appli... ADDA: SPIRIT - Autom... 2:40 PM

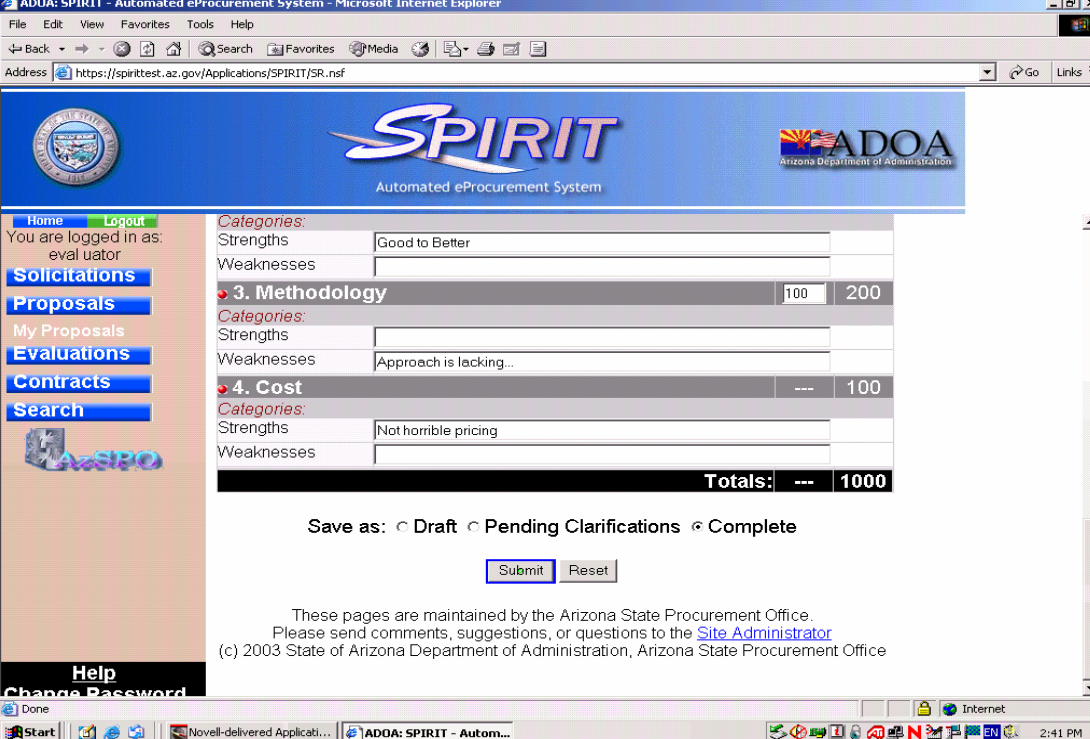
The evaluation form opens in "view" mode. See image previous page.

Click on the "edit"  icon to make the changes

Note the evaluations status is "Pending Clarifications."

Scroll down the "evaluation criteria" section so that you can complete the evaluation comments/score that were not completed before.

Note that clicking on the "Clarification Questions" link would bring you to the questions, not the supplier response



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Categories:

Strengths	Good to Better	
Weaknesses		

3. Methodology 100 200

Categories:

Strengths		
Weaknesses	Approach is lacking...	

4. Cost --- 100

Categories:

Strengths	Not horrible pricing	
Weaknesses		

Totals: --- 1000

Save as: ☐ Draft ☐ Pending Clarifications ☒ Complete

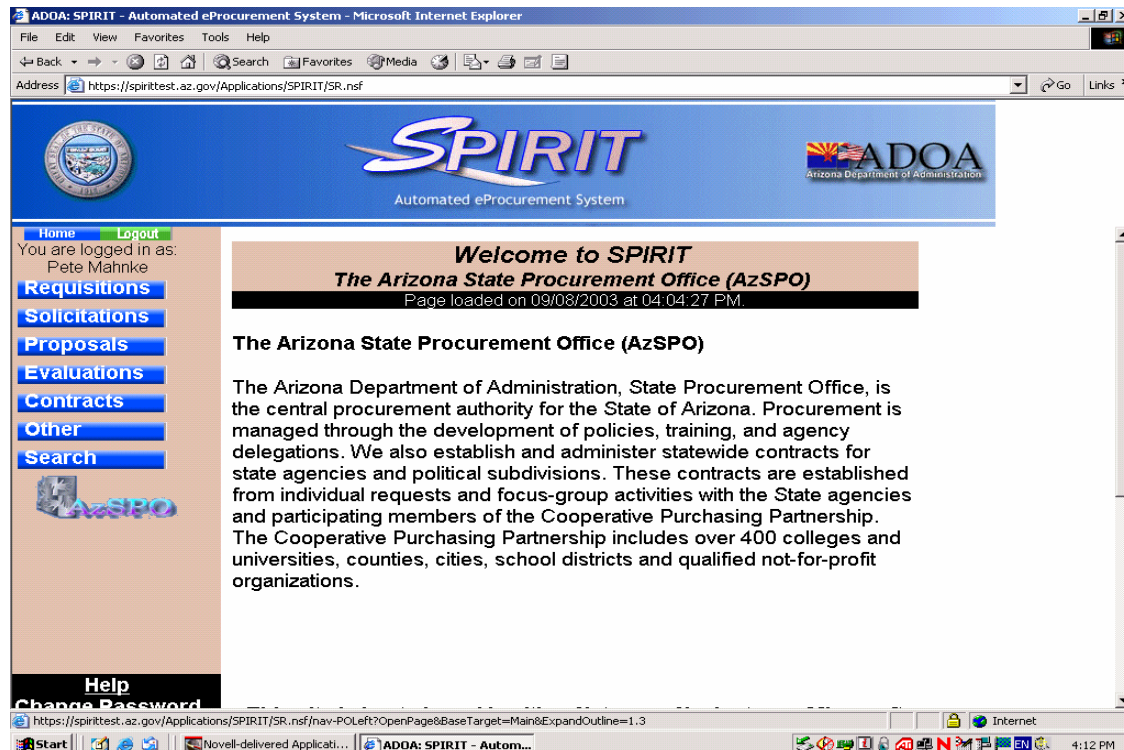
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The evaluator now enters the score and comments for this evaluation criteria category. Once that is done and the evaluation is done, scroll to the bottom of the screen to submit as

complete. Change the "Save as:" status to "Complete" and click on the  button.

The evaluation is now complete for this supplier. If there are other evaluators involved, they must complete their evaluations as well, before the PO can create the Proposal Evaluation Report (PER).

Proposal Evaluation Report (PER)



The evaluations for the two suppliers proposals to the solicitation have been completed. The PO will now go into each proposal and create the "Proposal Evaluation Report (PER)." As mentioned previously, the PER is a report created for each of the proposals to a solicitation. The report is created to illustrate the averaged or combined evaluation(s) of the individual evaluators on an evaluation committee and it edited to serve as a summary of remarks.

NOTE: When the PO has completed the draft of a PER it must be submitted to the evaluators for their approval. **HOWEVER**, once submitted it is no longer editable. When you are satisfied with the report inform the evaluators so that they can review the draft report(s). This will allow them to make comments and will allow for consensus prior to submitting the report for approval.

Click on the **Proposals** link. Click on the **My Proposals** link from the sub-menu.

At the "My Proposals By Solicitation Number" screen scroll down until you reach the proposal you wish to begin the PER for first.

Click on the proposal number link ADSM-5QRSVQ of the proposal you wish to start with.

Once in the proposal, scroll down the screen to the "Items To Complete" section.

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1. Clarification Response	-----	-----	Not Yet Required
2. Negotiations	-----	-----	Not Yet Required
3. BAFO	-----	-----	Not Yet Required
Other			
1. Solicitation Tabulation	-----	View	N/A
Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)	-----	View	Complete
2. Clarification Request	-----	-----	Not Yet Required
3. Proposal Evaluation Report	Create	-----	Pending
4. Supplier References Questionnaire	-----	-----	Pending
5. Supplier Meeting Request(s)	Create	View	N/A
6. Negotiations	-----	-----	Not Yet Required
7. BAFO Request	-----	-----	Not Yet Required

Done

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3. Proposal Evaluation Report - click on the [Create](#) link (circled above), to begin the draft.

Note that the status is "Pending." Also that the "Create" link was not available prior to the completion and submission of the evaluation(s).

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Proposal Information

Proposal #:	ADSM-5QRSVQ	Solicitation #:	AD040061-A1
Sol Title:	Solicitation Creation		
Supplier Name:	Grants Tombs		
Created By:	Pete Mahnke/Arizona State Procurement Office	PO:	Pete Mahnke/Arizona State Procurement Office
BAFO #:	0	Status:	Draft
Date Created:	09/08/2003	Date Submitted:	

Proposal Evaluation Report

Criteria (Points)	Pts	Max Pts
1. Conformance to Terms & Conditions and to Scope of Work	345	400

[Categories:](#)

(1 item remaining) Downloading picture <https://spirittest.az.gov/Applications/SPIRIT/PRO.nsf/Help2.gif?OpenImageResource...>

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Take a moment to familiarize yourself with the data available in the "Proposal Information" section of the PER.

Criteria (Points)		Pts	Max Pts
1. Conformance to Terms & Conditions and to Scope of Work		345	400
<i>Categories:</i>			
Strengths	eval uator/az.gov (300)		
	Not too strong		
	Pete Mahnke/Arizona State Procurement Office (390)		
	Extremely....		
Weaknesses	eval uator/az.gov (300)		
	Yet not too weak		
	Pete Mahnke/Arizona State Procurement Office (390)		

The image above is just one of the criteria to illustrate the format of the report.

It is this section below the proposal information section where the PO will create the PER based on the "evaluations." All evaluators comments will be listed for each criteria, so the PO will have the use of these comments for this reports creation. The language the PO uses for this report will combine the comments and type that in the "Strengths" and/or "Weaknesses" field (highlighted in dark blue)

It is only necessary to make comments in one of the two fields. Either in the "Strengths" or "Weaknesses" categories field. Even if you have included other criteria, it will only be necessary to comment in one of the fields. Basically, whichever one you deem most appropriate.

Note the comments of each of the evaluators, as well as the score they awarded for the category (highlighted in aqua). The eval uator made comments for both "Strengths" and "Weaknesses," Pete Mahnke only made comments in the "Strengths." The 300 and 390 points score even though repeated is only counted once.

The Spirit System averaged the scores of the evaluators for this criteria (highlighted in yellow). Also note that the "Maximum Points" available is viewable (400 in red font).

If the PO deems it necessary, s/he can override this score by typing in the "Points" field (highlighted in yellow).

Criteria (Points)		Pts	Max Pts
1. Conformance to Terms & Conditions and to Scope of Work		350	400
<i>Categories:</i>			
Strengths	<u>evaluator/az.gov</u> (300) Not too strong <u>Pete Mahnke/Arizona State Procurement Office</u> (390) Extremely.... We need...		
Weaknesses	<u>evaluator/az.gov</u> (300) Yet not too weak <u>Pete Mahnke/Arizona State Procurement Office</u> (390) 		

The PO made the combined comments for the "Strengths" (highlight in aqua) and adjusted the score from 345 to 350 (highlighted in yellow).

The PO will do this for each of the criteria from the evaluation criteria in the PER, for each of the PERs created per proposal.

4. Cost		90	100
Categories:			
Strengths	<u>evaluator/az.gov (90)</u> Not as good as the other supplier <u>Pete Mahnke/Arizona State Procurement Office (90)</u> \$10K higher than Azspo Test _____ _____		
Weaknesses	<u>evaluator/az.gov (90)</u> <u>Pete Mahnke/Arizona State Procurement Office (90)</u> _____ _____		

We've skipped down to the Cost criteria to illustrate that neither the PO nor evaluator(s) assigned a score to Cost. The Spirit System generated this score using the cost formula. The PO can, when drafting the PER adjust the Cost score. This will be important if the formula in Spirit is not appropriate to the Cost portion of an evaluation. It also holds importance when and if the evaluation goes to BAFO. If any of the suppliers change their pricing during BAFO the score is not reprocessed by Spirit. When and if you go BAFO a PER will have to be created for that as well. To generate the PER, Spirit duplicates the evaluation with its scores used in the first PER. So for instance, as the PO changed the score in the first criteria from 345 to 350, Spirit will duplicate the numbers it first averaged, 345.

Note the Spirit System requires that comments be made in at least one of the "Categories" for "Cost" as well.

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Strengths

evaluator/az.gov (90)	Not as good as the other supplier
Pete Mahnke/Arizona State Procurement Office (90)	\$10K higher than Azspo Test

Weaknesses

evaluator/az.gov (90)	Pricing could...
Pete Mahnke/Arizona State Procurement Office (90)	

Totals: --- 1000

Evaluator Approvals Approve

Save as: ☐ Draft ☒ Submit to Evaluators for Approval

Submit **Reset**

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4:14 PM

If the report is satisfactory to the PO, s/he can change the "Save as" status to "Submit to Evaluators for Approval" and click on the **Submit** button. Otherwise it can be submitted as "Draft."

REMEMBER that you will not be able to edit the PER once it has been submitted to evaluators for approval. Notify evaluators that the draft PER is available for their review and comments. Once all are satisfied, submit each PER for approval.

After submitting the PER to the evaluators, the PO is returned to the proposal the report was created for.

Click on **My Proposals** from the sub-menu to access any additional proposals submitted to the solicitation so that PERs can be created for those as well.

Note: during evaluation it is not necessary to wait until all evaluations are completed for all proposals before creating a PER. You may create a PER for any proposal for which the evaluation has been completed.

We will assume that both PERs have been submitted to the evaluators for their approval. If all goes as according to the discussions you have had, the approval process should not be too long.

Once approved, you the PO will go into the PERs last and complete the loop.

Once the evaluator(s) have approved of the the PER, the PO must access each one and approve them as well. Once this step is taken, the evaluation process can continue, prior to this the PER is not complete.

Click on the **Proposals** tab. Click on the **My Proposals** link from the sub-menu.

As done when creating the PERs locate and click on the proposal number link of the appropriate proposal(s), and click on the "proposal" number link

Once in the proposal, scroll to the bottom of the screen to the "Items To Complete" section.

Item	Action	Status
4. Insurance	View	N/A
5. Bid Bond	View	N/A
6. Performance Bond	View	N/A
Potentially Required In the Future		
1. Clarification Response	View	Complete
2. Negotiations		Not Yet Required
3. BAFO		Not Yet Required
Other		
1. Solicitation Tabulation	View	N/A
Items To Complete (For Internal Use Only)		
1. Evaluation(s) (Printable Eval COI)	View	Complete
2. Clarification Request	View	Complete
3. Proposal Evaluation Report	View	Pending Evaluators Approval
4. Supplier References Questionnaire	Create	Pending
5. Supplier Meeting Request(s)	Create View	N/A

Click on the [View](#) link under 3. Proposal Evaluation Report to access the report.

Note the status is "Pending Evaluators Approval." Regardless of whether or not the PO is one of the evaluators for a given solicitation, the Spirit System will consider the PERs status as this until the PO makes the final approval. However, if the PO is included as an evaluator, he or she will have to approve the PER twice. Once in the capacity of an evaluator and finally as the last approval as PO.

Once in the Proposal Evaluation Report, scroll down to the bottom of the screen to approve the PER.

4. Cost		---	100
Categories:			
Strengths	eval uator/az.gov (100)		
	Not horrible pricing		
	bill bill/Accountancy Board (100)		
	best price		
Weaknesses	great pricing		
	eval uator/az.gov (100)		
	bill bill/Accountancy Board (100)		
Totals:		---	1000

Evaluator Approvals

eval uator/az.gov on 09/08/2003 at 04:09:11 PM

bill bill/Accountancy Board on 09/08/2003 at 04:09:36 PM

To complete the report click on the button (outlined in blue).

Note that the Spirit System has recorded the approval of the evaluators. This includes their name, agency and the date/time that they actually approved the report. Once approved by the PO, Spirit will add their name to the list of approvals.

Once approved the PO would then move on to the next proposal(s) and approve those as well to complete the reports.

Note: If the PO is included as an evaluator in a procurement s/he will only need to approve the PER after the other evaluators have approved it. S/he will not have to return once as an evaluator and then again as the PO.

IFB Evaluation

This section covers the two ways (or options) for Evaluating and Awarding an IFB.

In Option 1, the PO generates an Evaluation Form which gives those involved an area to record comments on pricing and specification conformance, etc.

The PO then generates a Solicitation Evaluation Report, which, generates a checkbox list of the Offerors. Those checked will appear in the Tabulation for award.

Option 2 skips the Evaluation Form step. In this way, if comments are not necessary as is most often the case, and the Bid is awarded to the lowest conforming Bidder.

The PO generates the Solicitation Evaluation Report in preparation for the Tabulation for award.

To continue; Click on the supplier proposal number link to open the proposal at the Proposal by Proposal Number screen.

NOTE: No system generated evaluation form is necessary to award a bid. The PO can immediately move to the contract step if appropriate.

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My Proposals
By Solicitation Number
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[View All](#)

Supplier	Proposal #	Type	Status	Created Date
AD040164 - IFB AWARD II				
Grants Tombs	ADSM-5YJR9B	IFB	Complete	04/30/2004
Joe Azspo Scooters	ADSM-5YJR87	IFB	Complete	04/30/2004
AD040163-A1 - IFB Award				
Grants Tombs	ADSM-5YHU5G	IFB	Complete	04/29/2004
AD040163 - IFB Award				
Grants Tombs	ADSM-5YHT8W	IFB	Complete	04/29/2004
Joe Azspo Scooters	ADSM-5YHTYS	IFB	Complete	04/29/2004

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Click on the proposal number link([ADSM-5YHU5G](#)) to begin your review/evaluation.

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To Do List

Initially Required Items

Item	Status
1. Offer	Complete
2. Price Sheet	Complete
3. Questionnaire	Complete

Other

1. Solicitation Tabulation	N/A
----------------------------	-----

Items To Complete (For Internal Use Only)

1. Evaluation(s) (Printable Eval COI)	Pending
---	---------

Payment Terms

Contract Payment	ergsdfgsdf	Contract Delivery:	10 A.R.O. Days
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Attachments

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Scroll down to the To Do List and click on the [Create](#) link for **1. Evaluation(s)**, (Conflict of Interest statement). Once you accept the statement, an evaluation form will be generated.

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except those contacts specifically authorized by sections 41-2534, 41-2537, 41-2538 and 41-2578. The person shall disclose on this statement any contact unrelated to the pending procurement that the person may need to have with a representative of a competing offeror and any contact with a representative of a competing offeror during evaluation of proposals except those contacts specifically authorized by sections 41-2534, 41-2537, 41-2538 and 41-2578. A person who serves on an Evaluation Committee who fails to disclose contact with a representative of a competing offeror or who fails to provide accurate information on this statement is subject to civil penalty of at least one thousand dollars but not more than ten thousand dollars.

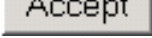
Evaluator Signature

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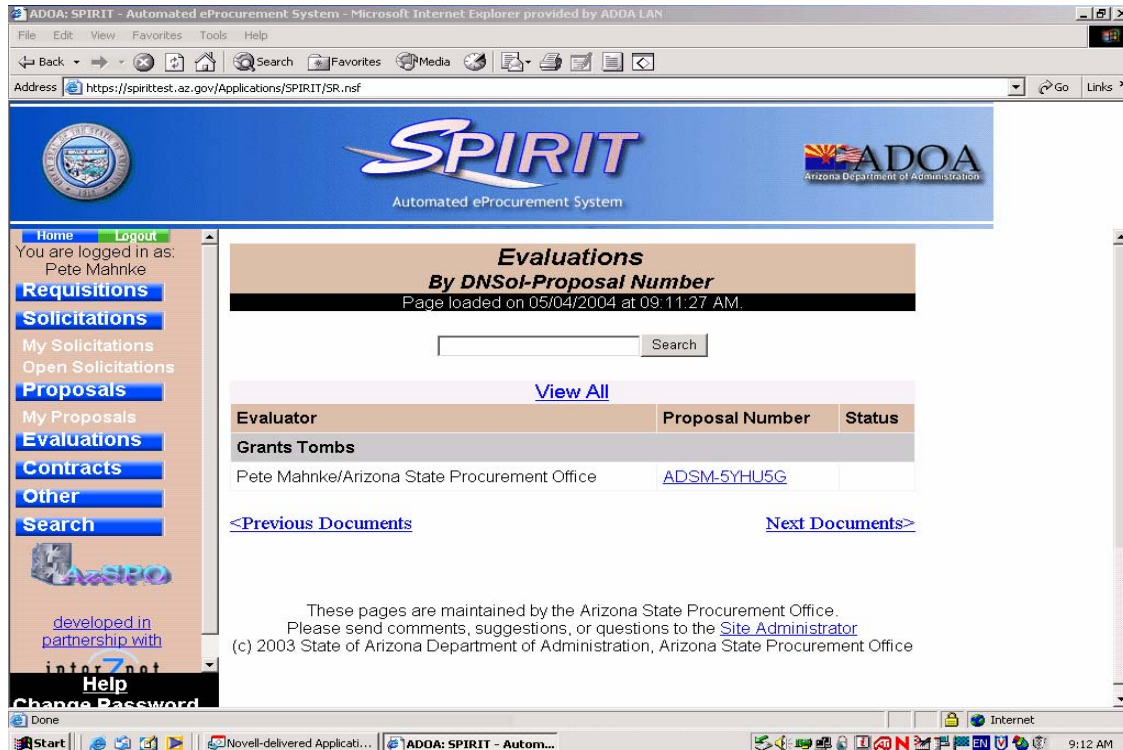
After reviewing the Conflict of Interest statement, click on the  button to continue. If you Reject the statement the user will not be able to view and evaluate the proposal to the IFB.

Once accepted, the system will generate a form like the above; for notes. As will be shown in Option 2, the PO could decide not to make any notations as the IFB is awarded by price.

In this instance, the PO feels it necessary to make comments regarding the Offer (and has made them).

When complete click on the button.

NOTE: although there is no Draft status, SPIRIT will allow the user to return and include additional comments if necessary prior to contract. Also, note the Proposal link. This link can be used to refer back to the proposal being reviewed.



Once the PO submits the comments to a particular offer; the system returns the user to the Evaluations screen.

The comments have been made (remember, the PO can return and add more comments if necessary, prior to creating a contract draft), to the offer. The next step is generating the Solicitation Evaluation Report or SER. The suppliers selected in the SER are those that the PO would like included in the Tabulation for award.

The PO must go into the solicitation to generate the SER. From the Navigation menu click on My Solicitations then click on the Solicitation number link **AD040163-A1**. From the list of solicitations. Or you may navigate via My Proposals and click on the solicitation from there. See image next page.

My Proposals

By Solicitation Number

Page loaded on 06/23/2004 at 03:33:23 PM.

View All				
Supplier	Proposal #	Type	Status	Created Date
AD040164 - IFB AWARD II				
Grants Tombs	ADSM-5YJR9B	IFB	Complete	04/30/2004
Joe Azspo Scooters	ADSM-5YJR87	IFB	Complete	04/30/2004

As described on previous page. Clicking on the solicitation number link from here gets you there too. Try navigating around in SPIRIT, you will find many different ways to get to the same locations. Likely you will find a route that suits you.

Once in the solicitation, scroll down to the bottom of the screen to the Related Documents\Information. At number 7. **Solicitation Evaluation Report**, click on the [View](#) link.

Solicitation Evaluation Report
Solicitation # AD040163-A1
 Page loaded on 05/04/2004 at 09:13:50 AM.

Please select the proposals you would like to view in the Tabulation Screen

Supplier	Cost
Initial Proposal	
<input type="checkbox"/> Grants Tombs	\$ 145,000.00

Submit Reset

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The suppliers that submitted offers/proposals to the solicitation will be listed here. It is necessary, as the statement in green indicates to select those suppliers that you want to appear in the Tabulation (for award). Selecting the suppliers, lists those to be awarded at the Tabulation when created. However, nothing in the system requires that you award to all that have been included in the SER. If for some reason the user wished to see all the suppliers that responded, in the Tabulation, he or she may.

Click in each checkbox ☐ to the left of the supplier(s) you want in the Tabulation. Then click on the **Submit** button.

Note: if no suppliers are selected from the SER, no contracts other than the Main contract will be generated. Failure to select suppliers to actually award to is not reversible in the application. Speak to your SPIRIT System Administrator if this happens.

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Comments:
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Related Documents\Information (For Internal Use Only)

1. Amendment(s)	Create	View
2. Tabulation	-----	View
3. Proposals	-----	View
4. Evaluation(s)	-----	View
5. Proposal Evaluation Reports	-----	N/A
6. Solicitation Evaluation Report	-----	View
7. Tabulation	Create	-----
8. Contract	-----	-----

Solicitation Review Comments

javascript:viewTabulation('AD5M-SYHTSV', 'LI', 'Create')

Start Novell-delivered Applicati... ADDA: SPIRIT - Autom... 9:14 AM

After clicking submit, you will be returned to the solicitation. Scroll to the bottom of the screen to the Related Documents\Information section of the document.

At number **7. Tabulation**, click on the [Create](#) link. This will generate the Tabulation (for award). It is on this screen that you will select which line items, groups, etc. by supplier to award to each.

NOTE: Once the Tabulation is produced it is not necessary to award to all those listed.

Tabulation By Group
Solicitation # AD040163-A1

Solicitation Type:	IFB	Tabulation Grouping:	By Line Items
1 0070-0018 0070-0018-0001	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles) Motor Scooters	Qty % Unit Price	Ext Price
Grants Tomb	dsasd	10 \$10,000.00	\$100,000.00 <input type="checkbox"/> Award
2 0070-0020 0070-0020-0001	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) Motor Scooters	Qty % Unit Price	Ext Price
Grants Tomb	asdsfas	5 \$9,000.00	\$45,000.00 <input type="checkbox"/> Award

Submit Cancel Reset

When the Tabulation opens a tabulation of the suppliers selected for the SER will be listed by line item and suppliers by that line item.

Click in the appropriate checkbox ☐ to Award each line item and to whom.

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SPIRIT: Tabulation for Solicitation # AD040163-A1 - Microsoft Internet Explorer provided by ADOA LAN

Solicitation IFB		Tabulation		By Line Items	
Type:		Grouping:			
Supplier	Manufacturer	Qty	%	Unit Price	Ext Price
1 0070-0018 0070-0018-0001	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles) Motor Scooters				
Grants Tombs	dsasd	10		\$10,000.00	\$100,000.00
					<input checked="" type="checkbox"/> Award
2 0070-0020 0070-0020-0001	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) Motor Scooters				
Grants Tombs	asdsfas	5		\$9,000.00	\$45,000.00
					<input checked="" type="checkbox"/> Award

[Submit](#) [Cancel](#) [Reset](#)

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Once the selections have been made, click on the [Submit](#) button at the bottom of the screen.

If you find that you selected a supplier or suppliers incorrectly, you may click on the View link at number **7. Tabulation** from the solicitation screen. You may then change any selections you may have made in error.

Note: reselecting/deselecting awards is no longer possible once the user has clicked on the Create link for **8. Contract**.

After clicking on the Submit button at the Tabulation, the user will be returned to the solicitation. Scroll to the bottom of the screen to the Related Documents/Information section, as this is where the user will generate the Main Contract.

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Related Documents\Information (For Internal Use Only)

1. Amendment(s)	-----	View
2. Tabulation	-----	View
3. Proposals	-----	View
4. Evaluation(s)	-----	View
5. Proposal Evaluation Reports	-----	N/A
6. Solicitation Evaluation Report	-----	View
7. Tabulation	-----	View
8. Contract	Create	-----

Solicitation Review Comments

Approvals
PO:
Customer: Pete Mahnke/Arizona State Procurement Office 04/29/2004 03:02:47 PM

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If you are ready to award the contract(s), click on the [Create](#) link at **8. Contract**. This will generate a draft copy of the Main Contract. As previously described; the Main Contract is the base document that all other contracts for this solicitation will draw data from. Once the user has entered terms, etc., attached the appropriate documents and is satisfied with the document, he or she will change the status of the Main Contract to Complete and click on the Submit button. This action will generate the individual supplier(s) contract.

It is necessary to select the appropriate Contract Information. Begin by selecting the Start Date, then enter the term* of the contract. You must then click within the checkbox to the left of Contract Extension Allowed (if an extension is allowed), and the maximum extensions possible. Checking Contract Extension Allowed instructs SPIRIT to allow for extension amendment functionality at the end of the term. If this selection is not made, SPIRIT will close the contract at the End Date and not allow for an extension (the SPIRIT Administrator should be able to straighten it out if you award incorrectly).

*It is only necessary to enter the Start Date as the End Date will calculate according to the Term entered. The calculation does not take place immediately and will only be apparent once the document is submitted. Best practice is to submit the contract draft as Draft and note that the calculation has taken place and is what you expected.

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Sections - Clauses

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[Uniform Instructions](#)
[Uniform Terms and Conditions](#)
Other Data
[* Price Sheet](#)

Attachments

Add Remove

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All Contracts

Contract #	Supplier	Title	Status	Start Date	End Date	A	A#
AD040163-A1-0	Main	IFB Award	Draft	05/04/2004	05/03/2005	No	0

Save as: ☒ Draft ☐ Complete

Submit Reset

Attach any documents necessary to the Main Contract. An example may be additional evaluation paper work (more likely in an RFP), required to appropriately come to an award conclusion.

Be sure to attach all files that you want included with the Main Contract. If this is not done before you have submitted as complete you will not be able to do so later. You may, however, attach documents to the supplier(s) contract(s) even after the contracts are considered complete.

If you absolutely must have a particular file attached to the main contract that you failed to attach prior to completion, contact your SPIRIT administrator.

If the contract is ready for completion, change the Save as: to Complete and click on the **Submit** button. This action will complete the Main Contract and generate any individual supplier contracts.

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Related Documents\Information (For Internal Use Only)

1. Amendment(s)	-----	View
2. Tabulation	-----	View
3. Proposals	-----	View
4. Evaluation(s)	-----	View
5. Proposal Evaluation Reports	-----	N/A
6. Solicitation Evaluation Report	-----	View
7. Tabulation	-----	View
8. Contract	-----	View

Solicitation Review Comments

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PO:
Customer: Pete Mahnke/Arizona State Procurement Office 04/29/2004 03:02:47 PM

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https://spirittest.az.gov/Applications/SPIRIT/PRO.nsf/Proc?Open&Login&Action=ConDINConMain?Open&Login&RestrictToCategory=AD04016

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom... 9:24 AM

Once the user clicks on the Submit button, they will be returned to the solicitation. Scroll down to the bottom of the screen to the Related Documents\Information section. Then click on the [View](#) link at **8. Contract** to view the contract(s).

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Contracts
By Main Contract
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[View All](#)

Contract #	Supplier	Title	Status	Start Date	End Date	A	A#
AD040163-A1-0	Main	IFB Award	Complete	05/04/2004	05/03/2005	No	0
AD040163-A1-1	Grants Tombs	IFB Award	Complete	05/04/2004	05/03/2005	No	0

[<Previous Documents](#) [Next Documents>](#)

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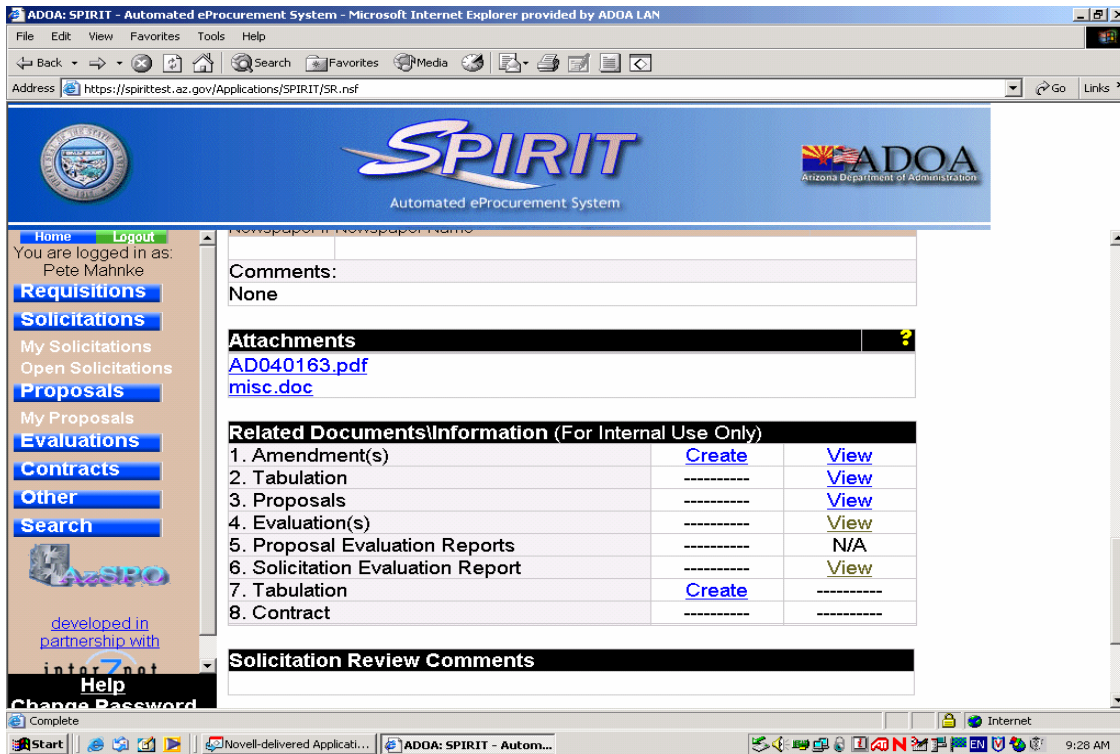
The Main Contract (always designated 0) will be listed, as well as any individual supplier contracts. The Supplier contracts generated have a Complete status and no additional input is necessary. Although, if you have documents/files you would like to attach to an individual contract(s), you may do so. Support Staff also has this functionality.

Note: SPIRIT will send an Award notification e-mail to all suppliers awarded. SPIRIT will also send an Unsuccessful notification e-mail. Whom to send what is calculated based on your selections in the previous steps covered.

Next up, we will cover Option 2 with regard to awarding an IFB.

IFB Evaluation/Option 2

Option 2 for evaluating and awarding an IFB is very similar to that which was just covered. This segment covers the process, which basically skips making any notes/comments to a proposal.



If detailed comments are not necessary regarding your review of proposals to an IFB, the user can skip to the SER section at the Related Documents\Information section at the bottom of the solicitation.

Click on the View link for **6. Solicitation Evaluation Report**

Solicitation Evaluation Report
Solicitation # AD040163
 Page loaded on 05/04/2004 at 09:28:04 AM.

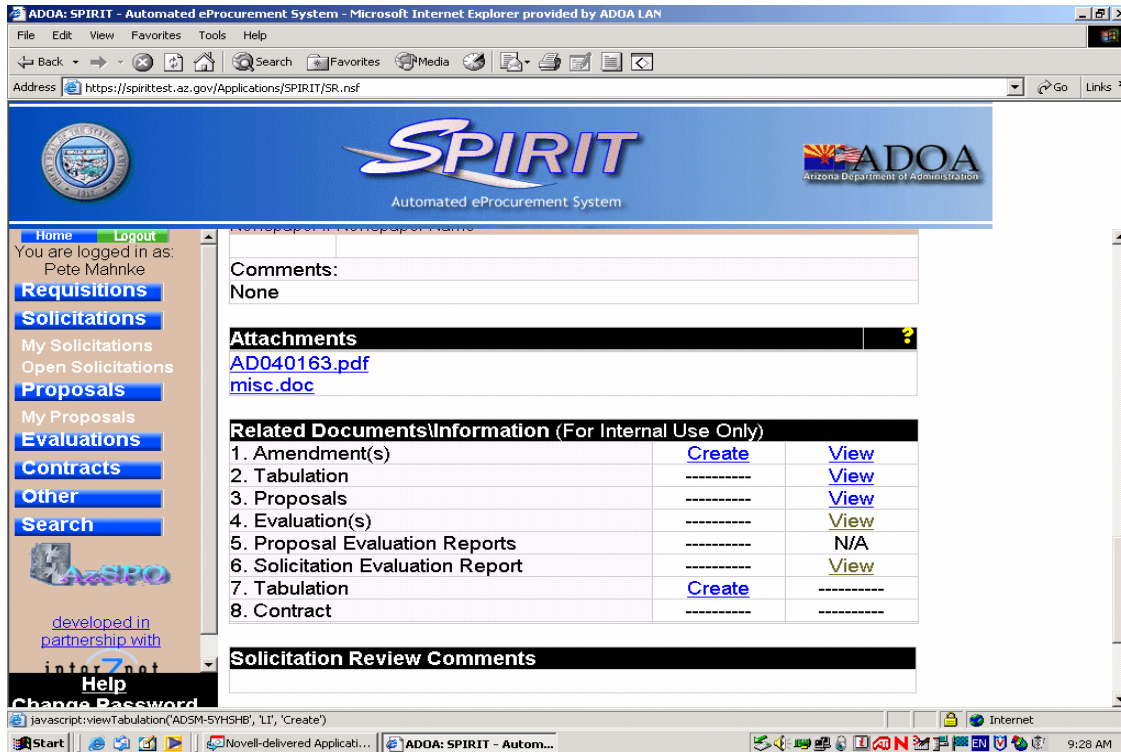
Please select the proposals you would like to view in the Tabulation Screen

Supplier	Cost
<input type="checkbox"/> Initial Proposal	
<input type="checkbox"/> Grants Tombs	\$ 122,000.00
<input type="checkbox"/> Joe Azspo Scooters	\$ 114,000.00

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Once generated (SER) click in the checkbox (es) ☐ to the left of the suppliers you wish to appear in the Tabulation (for award).

Then click on the button.



With the suppliers selected in the SER, you may now create the Tabulation (for award), by clicking on the [Create](#) link at **7. Tabulation**.

Note: if no suppliers are selected from the SER, no contracts other than the Main contract will be generated. Failure to select suppliers to actually award to is not reversible in the application. Speak to your SPIRIT System Administrator if this happens.

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SPIRIT: Tabulation for Solicitation # AD040163 - Microsoft Internet Explorer provided by ADOA LAN

Solicitation IFB Type:		Tabulation Grouping:		By Line Items	
Supplier	Manufacturer	Qty	%	Unit Price	Ext Price
1 0070-0018 Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles)					
0070-0018-0001 Motor Scooters					
Grants Tombs	Yugo	10		\$7,750.00	\$77,500.00 <input type="checkbox"/> Award
Joe Azspo Scooters	sga	10		\$8,000.00	\$80,000.00 <input type="checkbox"/> Award
2 0070-0020 Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)					
0070-0020-0001 Motor Scooters					
Grants Tombs	RinkyDink	5		\$8,900.00	\$44,500.00 <input type="checkbox"/> Award
Joe Azspo Scooters	dsaf	5		\$6,800.00	\$34,000.00 <input type="checkbox"/> Award

Submit Cancel Reset

Two suppliers responded to this solicitation and one line item each will be awarded. Click within the checkbox (es) ☐ to select which lines to award to whom. Once the selections have been made click on the **Submit** button.

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1. Amendment(s)	-----	View
2. Tabulation	-----	View
3. Proposals	-----	View
4. Evaluation(s)	-----	View
5. Proposal Evaluation Reports	-----	N/A
6. Solicitation Evaluation Report	-----	View
7. Tabulation	-----	View
8. Contract	Create	-----

Solicitation Review Comments

Approvals

PO:	Pete Mahnke/Arizona State Procurement Office	04/29/2004 02:08:27 PM
Customer:	Pete Mahnke/Arizona State Procurement Office	04/29/2004 02:08:11 PM

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Again, upon submission, the user is routed back to the solicitation. Scroll to the bottom of the screen to the Related Documents\Information section.

Click on the [Create](#) link to **8. Contract** to generate a draft Main contract.

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Contract
Solicitation #AD040163-A1
Page loaded on 05/04/2004 at 09:28:42 AM

Document Information			
Request		Amendment	
Type:	Main	Amendment:	No
Requisition #:	ADSM-5YHSDT	Solicitation #:	AD040163-A1
Created By:	Notes Administrator/az.gov	Date Created:	05/04/2004
PO Assigned:	Pete Mahnke/Arizona State Procurement Office	Date Completed:	05/04/2004
PM Assigned:	Rex Martin/Arizona State Procurement Office	PA Assigned:	--None Found--
Gov't Entity:	Arizona State Procurement Office	Type:	Agency
Process Status:	Pending Contract	Status:	Complete

You now have a draft Main contract, which you may set up as necessary. Please refer to the section that covers option one for instruction on the completion of your contract.

Supplier References

IS BAFO?	No	BAFO #:	U
Created By:	grant rangle/Grants Tombs	Supplier Name:	Grants Tombs
Date Created:	08/25/2003	Date Due:	08/25/2003 03:00 PM
Modified By:	grant rangle/Grants Tombs	Date Modified:	08/25/2003 02:18 PM
Total Price:	\$ 109,912.13	Date Submitted:	08/25/2003 02:18 PM

Solicitation General Information	
Title	Solicitation Creation
Solicitation Number:	AD040061-A1
Procurement Officer:	Pete Mahnke/Arizona State Procurement Office
Conference Location:	State Procurement Office
Conference Date:	09/01/2003 10:00 AM
Description	Solicitation creation
Amendment Information	
This amendment is issued in order to a one additional Line Item to the	

If you have requested references in your solicitation, Spirit allows you to create a "Supplier Reference Request."

The PO creates the request and enters the references e-mail or fax number. When submitted, Spirit sends the document out to the appropriate reference.



Since the reference is not part of the Spirit System any response to the reference request will have to be entered manually by the PO. You will need to be sure to enter any contact information necessary to the reference so that the response can be returned to the appropriate place. This is due to the fact that any notification e-mails generated by Spirit are sent from the server rather than a specific person.

Once in the "proposal" that you wish to create the reference request for, scroll to the "Items to Complete" section at the bottom of the proposal.

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Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)	-----	View	Complete
2. Clarification Request	-----	-----	Not Yet Required
3. Proposal Evaluation Report	-----	View	Complete
4. Supplier References Questionnaire	Create	-----	Pending
5. Supplier Meeting Request(s)	Create	View	N/A
6. Negotiations	Create Plan	-----	Not Yet Required
7. BAFO Request	Create	-----	Not Yet Required

Payment Terms

Contract Payment Terms:	Net 20	Contract Delivery:	12 A.R.O. Days
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Confidential Information

?

Attachments

Start | Novell-delivered Applicati... | ADOA: SPIRIT - Autom... | 10:52 AM

4. Supplier References Questionnaire

Click on the [Create](#) link to begin a draft of the "Supplier References Questionnaire."

Supplier Reference Request Proposal # AD040061-A1 Draft Page loaded on 09/11/2003 at 10:45:29 AM.			
● = Required Field			
Reference			
Ref #	Name	E Mail	Fax
		Note: E Mail or Fax required	Note: E Mail or Fax required
1	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>
Questions			
● Instructions			
Please answer these reference questions regarding...			
Add		1 ▼	
● 1			

Save as: ● Draft ○ Complete

The Supplier Reference Request is created. The Reference section contains the area for entering the contact information. It allows for the use of an e-mail address or fax number. The system allows for up to three references

It is necessary to enter instructions to the individual or company receiving the reference request. They may not even be aware that they may receive this.

This instruction field is a good place to describe what this is about and how to contact you and/or return the request response to. Remember, the document that the reference contact receives will be from the Spirit System if they try to respond to Spirit, they will be unsuccessful.

Like the "Questionnaire" in the solicitation, you may add additional question fields so as to include as many reference questions you feel appropriate.

More than one can be added at a time by the selecting the number from the number drop down menu.

Note: once a second question has been added to the reference request, the "Up" and "Down" arrows that you should becoming familiar with will appear to the right of this and additional fields. You may rearrange the order of the questions as you wish.

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1	Joseph Azspu	joe_azspu@hotmail.com	
2	Fred Henkelblecken		6025425508
3			

Questions

Instructions
Please answer these reference questions regarding...

Add 1

1 Would you please describe...

Save as: ☐ Draft ☒ Complete

Submit Reset

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Once you have entered all the reference questions, you may save the request as "Draft" and return to it later to send out or as in this instance set the "status" to "Complete" and click on

the  button

Once submitted you will be routed back to the proposal the reference was created for.

Supplier Reference Response(s)

The PO has received the responses to the "Supplier Reference Request."

You must then return to each "proposal" and type in the reference responses.

Scroll down to the "Items To Complete" section of the proposal.

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Other			Required
1. Solicitation Tabulation	-----	View	N/A
Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)	-----	View	Complete
2. Clarification Request	-----	-----	Not Yet Required
3. Proposal Evaluation Report	-----	View	Complete
4. Supplier References Questionnaire	-----	View	Complete
5. Supplier Meeting Request(s)	Create	View	N/A
6. Negotiations	Create	-----	Not Yet Required
7. BAFO Request	Create	-----	Not Yet Required

Payment Terms

Contract Payment Terms:	Net 20	Contract Delivery:	12 A.R.O. Days
-------------------------	--------	--------------------	----------------

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Start | Novell-delivered Applicati... | ADOA: SPIRIT - Autom... | 11:11 AM

Click on the [View](#) link at; 4. Supplier Reference Questionnaire."

Supplier Reference Request

Proposal # AD040061-A1

Page loaded on 09/11/2003 at 11:04:03 AM.

Reference		
Ref #	Name	E Mail
1	Joseph Azspo	joe_azspo@hotmail.com
2	Fred Henkelblecken	
3		

All Responses			
Reference	Status	eMail	Fax
Joseph Azspo	Draft	joe_azspo@hotmail.com	-----
Fred Henkelblecken	Draft	-----	6025425508

Questions	
Please answer these reference questions regarding...	
1	Would you please describe...

The screen for the "Supplier Reference Request" has changed slightly. It now includes the "reference contacts" that you sent the "request" to.

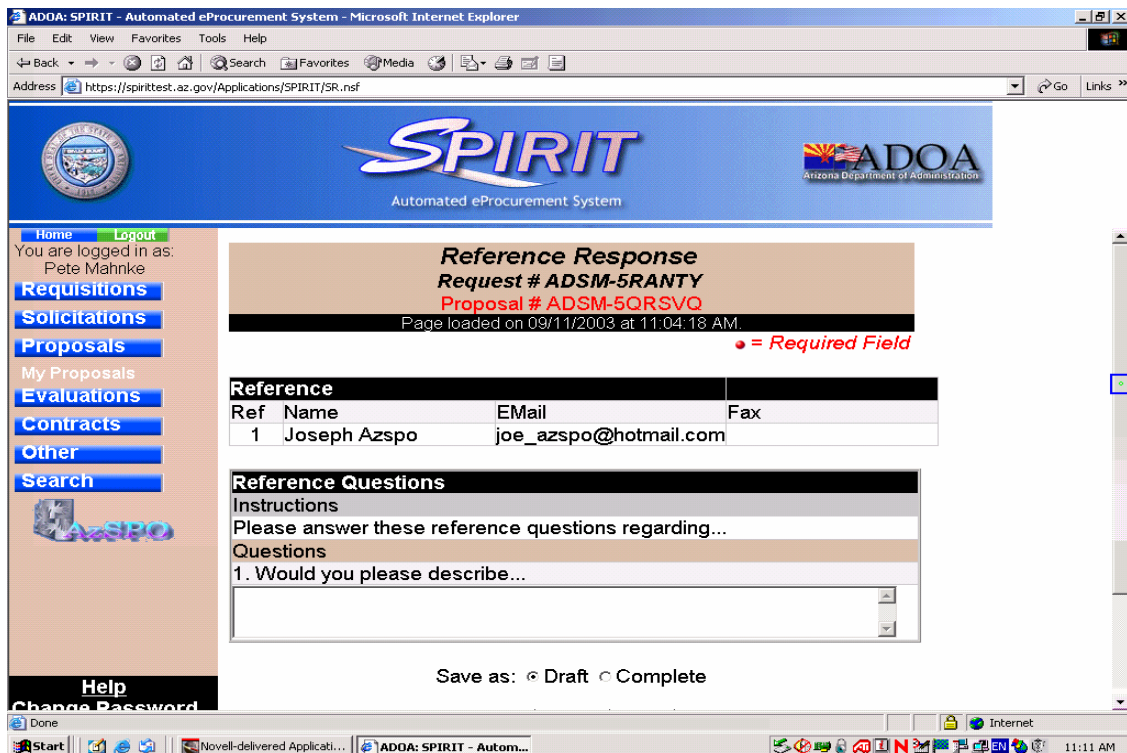
Note that both have a "Status" of "Draft." When you submitted them as "Complete," Spirit created the individual response documents for entering their answers; it is these response documents that are in "Draft" status.

Click on the name link [Joseph Azspo](#) of the contact you would like to enter the answers for.




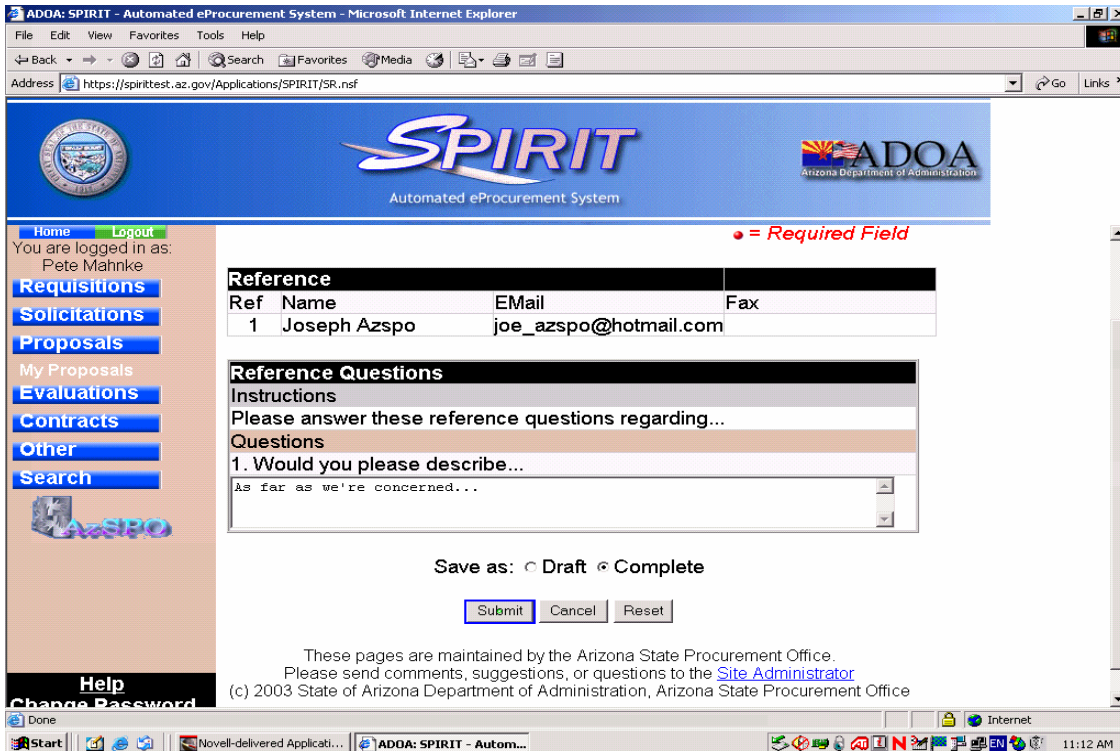
This is a screen shot of the document Spirit sent to the reference. Joe Azspo received an e-mail in his Hotmail account answered the question(s) and returned them to the PO. It is this answer and others if asked, that you will enter in the reference document.

Remember that this response document is outside the Spirit System.



When you click on the name link that individuals reference form will open. As usual, the document is in "view" mode.

Click on the "edit"  icon to open it in edit mode. It will then refresh and the answer field will allow for the input of the response. Type in the references response to the question(s).



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Reference

Ref	Name	Email	Fax
1	Joseph Azspo	joe_azspo@hotmail.com	

Reference Questions

Instructions
Please answer these reference questions regarding...

Questions

1. Would you please describe...

As far as we're concerned...

Save as: ☐ Draft ☒ Complete

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Done

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom...

Internet

11:12 AM

Change the status to ☒ **Complete** and click on the button.

If you were not done at this point, you would "Save as:" "Draft."

Click on the name link for the second reference [Fred Henkelblecken](#).

There is no screen shot of this response.

Change the document to "edit"  mode.

Enter the reference response, change the status to ☒ **Complete** and click on the button to finish with this document.

Reference

Ref #	Name	Email	Fax
1	Joseph Azspo	joe_azspo@hotmail.com	
2	Fred Henkelblecken		6025425508
3			

All Responses

Reference	Status	eMail	Fax
Joseph Azspo	Complete	joe_azspo@hotmail.com	-----
Fred Henkelblecken	Complete	-----	6025425508

Questions

Please answer these reference questions regarding...

- 1 Would you please describe...

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The reference portion of the solicitation process is complete.

Note that their "Status" is now "Complete." Click on the name links to view the responses at anytime

Back at the proposal at the "Items To Complete" section, the "Supplier References" will now have a "View" link. From this point on when you click on the "View" link the screen above will open allowing you to click on the reference name link so that you can view their responses.

The hard copy document that you received may be scanned and attached to the suppliers contract when the procurement process is complete if you wish.

Supplier Meeting Request

At times during the procurement process you may find it necessary to set up a meeting with various suppliers. This section of the manual walks you through the process of creating a "Supplier Meeting Request."

Once at the proposal that you would like to create a meeting request for, scroll down to the "Items To Complete" section of the proposal

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3. BAFO

Required	Not Yet	Required
Other		
1. Solicitation Tabulation	View	N/A
Items To Complete (For Internal Use Only)		
1. Evaluation(s) (Printable Eval COI)	View	Complete
2. Clarification Request		Not Yet Required
3. Proposal Evaluation Report	View	Complete
4. Supplier References Questionnaire	View	Complete
5. Supplier Meeting Request(s)	Create	N/A
6. Negotiations	Plan	Not Yet Required
7. BAFO Request	Create	Not Yet Required

Payment Terms

Contract Payment	Net 20	Contract Delivery	12 A.R.O. Days
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11:16 AM

5. Supplier Meeting Request(s):

Click on the [Create](#) link to draft the request.

Type in a brief description/title for the meeting request as you might in an e-mail subject line. Then type in the details of the request. Once you have typed all the necessary information, scroll to the bottom of the screen and submit the request to the supplier. There is no "draft" status for this document. You need to create and complete the document at one time. Once

you click on the **Submit** button, the meeting request will be routed directly to the suppliers e-mail address. There is no limit to the number of "Supplier Meeting Request" you create.

The actual request is not within the Spirit System, with the exception of your view of it once completed.

Date	Description	Details
09/11/2003 11:09:30 AM	Meeting to discuss your proposal to AD040061-A1	Please contact me to discuss a meeting...

[<Previous Documents](#) [Next Documents>](#)

Once created, you can click on its title link [09/11/2003 11:09:30 AM](#) to view the request. Each "Supplier Meeting Request" you have created for this supplier will open in "View" mode. They cannot be edited once submitted as they have already been sent.

Negotiations

Item Number	Description	Action Links	Status
3.	BAFO		Not Yet Required
Other			
1.	Solicitation Tabulation	View	N/A
Items To Complete (For Internal Use Only)			
1.	Evaluation(s) (Printable Eval COI)	View	Complete
2.	Clarification Request		Not Yet Required
3.	Proposal Evaluation Report	View	Complete
4.	Supplier References Questionnaire	View	Complete
5.	Supplier Meeting Request(s)	Create View	N/A
6.	Negotiations	Create Plan	Not Yet Required
7.	BAFO Request	Create	Not Yet Required

Payment Terms	
Contract Payment	Net 20
Contract Delivery:	12 A.R.O. Days

Procurements often require **"Negotiations."**

This portion of the manual will walk you through the process of creating a "Negotiation" document. The first step of which, is the drafting of the "Proposal Negotiation Plan." The "plan" is created on a screen that includes the information from the "Evaluation" so that you use it as a guide to record any negotiation points you would like to cover.

Once the "Plan" has been created, a link for the creation of the "Proposal Negotiation Request" document that will be routed to the supplier for completion, will be present.

You will likely be in close communication with your evaluation committee in the drafting of this plan as it is the basis for the "Negotiation Request" that you send to the supplier.

In the "Items To Complete" section of the proposal

6. Negotiations

Click on the [Create](#) link for negotiations

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Solicitation # AD040061-A1
Proposal # ADSM-5QRSVQ
 Page loaded on 09/11/2003 at 11:39:30 AM.

• = Required Field

Proposal Information			
Proposal #:	ADSM-5QRSVQ	Solicitation #:	AD040061-A1
Sol Title:	Solicitation Creation		
Supplier Name:	Grants Tombs		
Created By:	Jon Kopperud/az.gov	PO:	Pete Mahnke/Arizona State Procurement Office
BAFO #:	0	Status:	Draft
Date Created:	09/11/2003	Date Submitted:	

Negotiation Plan	
Criteria	Pts
1. Conformance to Terms & Conditions and to Scope of Work	345

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Draft

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When you click on “create” a Proposal Negotiation Plan form is created.

Note the information in the Proposal Information section. The Proposal number, Solicitation number and Supplier Name are links that return you to the various documents.

Scroll to the bottom of the screen to view the evaluation criteria and the fields that you will enter negotiation points.

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BAFO #:	0	Status:	Office
Date:	09/11/2003	Date:	Draft
Created:		Submitted:	

Negotiation Plan

Criteria	Pts
1. Conformance to Terms & Conditions and to Scope of Work	345
Categories:	
Strengths	evaluator/az.gov (300) Not too strong Pete Mahnke/Arizona State Procurement Office (390) Extremely....
Weaknesses	evaluator/az.gov (300) Yet not too weak Pete Mahnke/Arizona State Procurement Office (390)
2. Key Personnel/Qualifications	262

Draft

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom... Internet 11:47 AM

This form is like the form used to create the PER. Each evaluators comments and averaged scores from the evaluation are available for reference when creating the plan.

Type comments or negotiation points in either the "Strengths" or "Weaknesses" field. If you wish, you may type within both fields.

You must type comments in at least "Strengths" or "Weaknesses" for each of the evaluation criteria.

Once you have typed in negotiation points into each of the four criteria, you would submit the plan as either "Draft" or "Complete." Whether submitted as "Draft" or "Complete" the evaluators will have access to the "plan" so that all may confer and come to a consensus when the PO drafts the "Negotiation Request."

The demo will save this as "Draft" and return to the document to complete it to show how the plan will appear if you save a draft and return to complete the document.

Leaving the document as the system default "Draft" click on the  button.

Once submitted as "Draft" and back at the proposal, scroll down to the "Items To Complete" section at the bottom of the screen.

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Questionnaire	Create	View	Complete
5. Supplier Meeting Request(s)	Create	View	N/A
6. Negotiations	View Plan	View	Not Yet Required
7. BAFO Request	Create	-----	Not Yet Required

Payment Terms

Contract Payment	Net 20	Contract Delivery:	12 A.R.O. Days
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Confidential Information ?


Attachments ?
[Rangle Attachment.doc](#)


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Start | Draft | Novell-delivered Applicati... | ADOA: SPIRIT - Autom... | Internet | 11:47 AM

6. Negotiations - click on the [View Plan](#) link.

Proposal Negotiation Plan
Solicitation # AD040061-A1
Proposal # ADSM-5QRSVQ
Page loaded on 09/11/2003 at 11:40:36 AM.

Proposal Information			
Proposal #:	ADSM-5QRSVQ	Solicitation #:	AD040061-A1
Sol Title:	Solicitation Creation		
Supplier Name:	Grants Tombs		
Created By:	Pete Mahnke/Arizona State Procurement Office	PO:	Pete Mahnke/Arizona State Procurement Office
BAFO #:	0	Status:	Draft
Date Created:	09/11/2003	Date Submitted:	

The "Proposal Negotiation Plan" will be in view mode. Click on the "edit"  icon to open in edit mode. The PO may be returning to the "plan" to make changes based upon the discussions with the evaluation committee. Changes can be made on the document until it has been submitted as "Complete."

Strengths	evaluator/az.gov (90)
	Not as good as the other supplier
	Pete Mahnke/Arizona State Procurement Office (90)
	\$10K higher than Azspo Test
	<input type="text" value="We need to get this down..."/>
Weaknesses	evaluator/az.gov (90)
	Pete Mahnke/Arizona State Procurement Office (90)
	<input type="text"/>
Totals: 835	

Save as: ☐ Draft ☒ Complete

If the PO is satisfied with the "plan," s/he will scroll to the bottom of the screen, change the "Save as" to "Complete" and click on the button.

The "Proposal Negotiation Plan" has been created. You are now back at the supplier proposal that you created the "plan" for.

The next step in the process is to create the actual "negotiation" document, which when complete, will be routed to the supplier for response.

Scroll down the screen to the "Items To Complete" section of the proposal.

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1. Solicitation Tabulation ----- View N/A

Items To Complete (For Internal Use Only)

1. Evaluation(s) (Printable Eval COI)	-----	View	Complete
2. Clarification Request	-----	-----	Not Yet Required
3. Proposal Evaluation Report	-----	View	Complete
4. Supplier References Questionnaire	-----	View	Complete
5. Supplier Meeting Request(s)	Create	View	N/A
6. Negotiations	View Plan	View	Not Yet Required
7. BAFO Request	Create	-----	Not Yet Required

Payment Terms

Contract Payment	Net 20	Contract Delivery:	12 A.R.O. Days
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Complete

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom...

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To create the "Negotiation Request" click on the [View Plan](#) link.

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Proposal Negotiation Plan
Solicitation # **AD040061-A1**
Proposal # **ADSM-5QRSVQ**
Page loaded on 09/11/2003 at 11:41:25 AM

Proposal Information

Proposal #:	ADSM-5QRSVQ	Solicitation #:	AD040061-A1
Sol Title:	Solicitation Creation		
Supplier Name:	Grants Tombs		
Created By:	Jon Kopperud/az.gov	PO:	Pete Mahnke/Arizona State Procurement Office
BAFO #:	0	Status:	Complete
Date Created:	09/11/2003	Date Submitted:	

Negotiation Plan

Criteria	Pts
----------	-----

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Complete

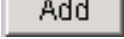
Start Novell-delivered Applicati... ADOA: SPIRIT - Autom...

Internet 11:48 AM

Note in the image above that an "edit" icon is no longer present. The document has been completed, so it may not be changed. Click on the [Create Negotiation Request](#) link that is now present.

The "Proposal Negotiation Request" is very much like the questionnaire forms that you should now be familiar with.

You will need to include instructions to the supplier for the handling of this document.

Like the other questionnaire format documents, you can  as many questions fields as you feel is necessary. If you have included too many leave the last ones blank and they will not appear in the final document. Type your negotiation questions/comments in the field. The "Up" and "Down" arrows are available for rearranging your points or questions once you have added at least one additional field.

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Negotiation Form ?

Instructions

Grant,
Please address the issues...

Add 1

1	If the state were to...	
2	With regard to Personnel	

Save as: ☐ Draft ☒ Submit to Supplier for Completion

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If done and ready to be routed to the supplier, change the status to "Submit to Supplier for Completion" and click on the **Submit** button. Otherwise it can be saved as "Draft," so that evaluators can continue to view and make verbal or e-mail comments to the PO.

Supplier Proposal for Solicitation AD040061-A1
Proposal #ADSM-5QRSVQ
Complete
 Page loaded on 09/11/2003 at 11:42:29 AM

Proposal Information			
Proposal #:	ADSM-5QRSVQ	Status:	Complete
Is BAFO?	No	BAFO #:	0
Created By:	grant rangle/Grants Tombs	Supplier Name:	Grants Tombs
Date Created:	08/25/2003	Date Due:	08/25/2003 03:00 PM
Modified By:	grant rangle/Grants Tombs	Date	08/25/2003 02:18 PM
Total Price:	\$ 109,912.13	Modified:	
		Date Submitted:	08/25/2003 02:18 PM

Solicitation General Information			
Title	Solicitation Creation		
Solicitation Number:	AD040061-A1	Solicitation Type:	RFP

If "Submit to Supplier for Completion" was selected, you will once again be returned to the proposal.

4. Supplier References Questionnaire	-----	View	Complete
5. Supplier Meeting Request(s)	Create	View	N/A
6. Negotiations	View Plan	View	Complete
7. BAFO Request	Create	-----	Not Yet Required

At the bottom of the proposal in the "Items To Complete" section you now have a "View Plan" link, as well as a "View" link for the "Negotiation Request" itself.

Click on the [View](#) link to see how the "request" appears in the system.

Proposal Negotiation Requests By Proposal Number

Page loaded on 09/11/2003 at 11:42:35 AM.

Date Created	Neg Req #	Proposal #	Status	Requestor
09/11/2003 11:41:44 AM	ADSM-5RAPX5	ADSM-5QRSVQ	Complete	Pete Mahnke/Arizona State Procurement Office

[<Previous Documents](#)

[Next Documents>](#)

The link for access to the "request" is the date and time it was completed. You would click on [09/11/2003 11:41:44 AM](#) to view it. All other info is to the links right.

Proposal Negotiation Request Proposal # ADSM-5QRSVQ

Page loaded on 09/11/2003 at 11:42:38 AM.

Negotiation Form	
Instructions	
Grant,	
Please address the issues...	
1	If the state were to...
2	With regard to Personnel

The image above illustrates what the completed and submitted "Proposal Negotiation Request appears in the Spirit system.

Next up; viewing the "Proposal Negotiation Request" once it has been completed by the supplier.

Viewing the Negotiation Response.

To Do List			
Initially Required Items			
Item			Status
1. Offer	-----	View	Complete
2. Price Sheet	-----	View	Complete
3. Questionnaire	-----	View	Complete
4. Insurance	-----	View	N/A
5. Bid Bond	-----	View	N/A
6. Performance Bond	-----	View	N/A
Potentially Required In the Future			
1. Clarification Response	-----	-----	Not Yet Required
2. Negotiations	-----	View	Complete
3. BAFO	-----	View	Not Yet Required

The "negotiation" has been completed by the supplier.

Once in the appropriate suppliers proposal, scroll down to the "To Do List." Within the "To Do List" is the section entitled "Potentially Required in the Future." You may remember that this was where you viewed the "Clarification Response" in the other suppliers proposal.

When the negotiation is complete you will receive an e-mail notification from the Spirit System. Had you followed the link within the e-mail, it would have opened Spirit at the log in screen. Once logged in, you would have been routed directly to the "Negotiation Response."

Click on the "View" link to see the response to the negotiation.

Proposal Negotiation Reponses By Request Number

Page loaded on 09/11/2003 at 12:11:08 PM.

	Search
--	--------

Date Requested	Neg Res #	Status	Requestor
09/11/2003 11:42:28 AM	ADSM-5RAPXK	Complete	Pete Mahnke/Arizona State Procurement Office

[<Previous Documents](#)

[Next Documents>](#)

The "Proposal Negotiation Responses" screen opens, Click on the link ([09/11/2003 11:42:28 AM](#)) to open the response. Image previous page.

Negotiation Response Proposal # ADSM-5QRSVQ Solicitation # AD040061-A1

Page loaded on 09/11/2003 at 12:11:11 PM.

Negotiation Questions

Instructions

Grant,

Please address the issues...

Questions

1. If the state were to...

I don't see why...

2. With regard to Personnel

My brother-in-law...

You are then able to read the suppliers response to the "Proposal Negotiation Request."

As you have created a negotiation request and received a response, the system requires that you go through the BAFO process.

BAFO

Going BAFO

Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)	-----	View	Complete
2. Clarification Request	-----	-----	Not Yet Required
3. Proposal Evaluation Report	-----	View	Complete
4. Supplier References Questionnaire	-----	View	Complete
5. Supplier Meeting Request(s)	Create	View	N/A
6. Negotiations	View Plan	View	Complete
7. BAFO Request	Create	-----	Not Yet Required

Based upon the evaluation and the negotiations the PO has decided to go to BAFO with this supplier.

When the PO creates a BAFO, the Spirit System creates a questionnaire for the PO to set up to send to the supplier. The supplier receives notification of BAFO, which directs them to the document to view. Once they click on "Submit BAFO," the system generates a duplicate of their original proposal with additional BAFO related access. The supplier is then able to readdress everything within their proposal.

To create a BAFO scroll down to the "Items To Complete" section within the appropriate suppliers proposal and click on the [Create](#) link at 7. BAFO Request

BAFO Request
Proposal # ADSM-5QRSVQ
 Page loaded on 09/11/2003 at 12:04:05 PM.

● = Required Field

BAFO Request	
Instructions	
● Due Date: - - -	
Add 1	
● 1	

Save as: ☒ Draft ☐ Submit to Supplier for Completion

The "BAFO Request" form or questionnaire is generated. This form should be considered as a means of writing a BAFO letter. It's functionality is like the other questionnaire based forms you will work with in the Spirit System.

The PO must select a due date for the suppliers response from the "Due Date" drop down menu. If the supplier responds earlier than the "due date," the system allows the PO and evaluators to begin the evaluation of the "BAFO Response." If the supplier does not respond in time, evaluation is still possible. The Spirit System will not deny the supplier the ability to submit the response as it denies a proposal response after the "close date" for the original solicitation.








Type in the necessary instructions. Consider this area as the body of the BAFO letter.

The PO types in the first area of the proposal s/he wants the supplier to address.

Just like previous questionnaire forms in the Spirit System, the PO can add as many additional question fields as is necessary by clicking on the button.


Type in the second field created (the final image of this BAFO questionnaire will have four issues for the supplier to address). As with other questionnaire forms, leave any extra that you did not use at the end of the form.

You will always want to include one last field to instruct the supplier to make note of any changes they have made in their BAFO response from the original proposal.

BAFO Request	
Instructions	
Due Date: 9 11 2003	
You have been selected to receive....	
Add 1	
1	Please address... 
2	Your methodology...  
3	Pricing...  
4	Please make note of any changes you have made in your BAFO response from the original proposal.  

A finished BAFO questionnaire may look something like the above image (hopefully it would be a little more detailed).

Note: use the   to rearrange any questions (if necessary).

Once complete, change the status to "Submit to Supplier for Completion" and click on the  button.

Had the PO saved it as "Draft" the evaluators would have been able to review the document prior to routing it to the supplier.

The "BAFO Request" has been completed and submitted to the supplier. You are now back at the suppliers proposal.

Next up, dealing with the "BAFO Response."

BAFO Response

<u>AD040061-A1</u> - Solicitation Creation				
Grants Tombs	<u>ADSM-5QRSVQ</u>	RFP	Complete (BAFO)	08/25/2003
Grants Tombs	<u>ADSM-5QRSVQ-1</u>	RFP	Complete	09/11/2003
Joe Azspo Test	<u>ADSM-5QRQAC</u>	RFP	Complete (BAFO)	08/25/2003
Joe Azspo Test	<u>ADSM-5QRQAC-1</u>	RFP	Complete	09/11/2003

As with other steps in the process, the PO would have received an e-mail notification from Spirit regarding the completion of the BAFO by the supplier.

Note the proposals listed under the solicitation. The original proposal ADSM-5QRSVQ has a status of "Complete (BAFO)." The BAFO in parenthesis indicates that it has gone into the BAFO process. For all intents and purposes, this proposal is no longer active; although it can be viewed. The new document is ADSM-5QRSVQ-1. This is the proposal that was created by the supplier when they clicked on the "Submit BAFO" link to respond to the request.

It is this document that the rest of the evaluation will be based on (unless you go BAFO again).

Once the PO and evaluators have reviewed the response, it is up to the PO to create a PER based on the BAFO. But more on this later in the process.

Both suppliers were sent "BAFO Requests" however, the manual will only cover addressing one of the two.

Click on the "BAFO Proposal" link

Supplier Proposal for Solicitation AD040061-A1
Proposal #ADSM-5QRSVQ-1
BAFO Complete
Page loaded on 09/11/2003 at 12:29:16 PM.

Proposal Information			
Proposal #:	ADSM-5QRSVQ-1	Status:	Complete
Is BAFO?	Yes	BAFO #:	1
Created By:	grant rangle/Grants Tombs	Supplier Name:	Grants Tombs
Date Created:	09/11/2003	Date Due:	09/11/2003 03:00 PM
Modified By:	grant rangle/Grants Tombs	Date Modified:	09/11/2003 12:21 PM
Total Price:	\$ 83,850.00	Date Submitted:	09/11/2003 12:21 PM

The "Proposal Information" section contains some new information. "Is BAFO?" now indicates YES and "BAFO #" indicates 1.

Scroll down to the "To Do List."

To Do List			
Initially Required Items			
Item			Status
A. Previous Proposal	-----	View	N/A
B. BAFO Questionnaire	-----	View	Complete
1. Offer	-----	View	Complete
2. Price Sheet	-----	View	Complete
3. Questionnaire	-----	View	Complete
4. Insurance	-----	View	N/A
5. Bid Bond	-----	View	N/A
6. Performance Bond	-----	View	N/A

The "To Do List" now contains two additional options "A. Previous Proposal" and "B. BAFO Questionnaire."

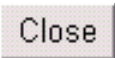
For reference, while in the BAFO proposal, the PO (and evaluators), can click on the [View](#) link to route to the previous proposal.

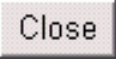
Click on the [View](#) link of B. BAFO Questionnaire to view it. Clicking on any of the other links will open those areas. As this is the suppliers BAFO proposal/response, any changes made by them would be in this new proposal.

<p align="center">BAFO Response Proposal # ADSM-5QRSVQ Solicitation # AD040061-A1</p>
Page loaded on 09/11/2003 at 12:29:27 PM.

BAFO Questions	?
Instructions	
You have been selected to receive....	
Questions	
1. Please address...	
We hope that...	
2. Your methodology...	
We have edited the methodology...	
3. Pricing...	
LI 1 has been reduced to \$8,900.00	
LI 2 has been reduced to \$7,495.00	
4. Please make note of any changes you have made in your BAFO response from the original proposal.	
Changes have been noted within each question.	
We also....	

The "BAFO Response" form opens, allowing for the review of responses to the points or questions included in the "BAFO Request."

Click on the  button or the windows X to return to the BAFO Proposal when done viewing the responses.

Note: the image of the response does not include the  button or windows X that is available on the actual screen.

You must consider this an entirely new proposal in the sense that any changes the supplier made while responding to the request were made in this document.
 The Offer and Acceptance form is new as well. The supplier was required to accept responsibility of making good on this BAFO as s/he did in the original proposal.

If changes were made to the price sheet, this price sheet will reflect those changes.

To Do List			
Initially Required Items			
Item			Status
A. Previous Proposal	-----	View	N/A
B. BAFO Questionnaire	-----	View	Complete
1. Offer	-----	View	Complete
2. Price Sheet	-----	View	Complete
3. Questionnaire	-----	View	Complete
4. Insurance	-----	View	N/A
5. Bid Bond	-----	View	N/A
6. Performance Bond	-----	View	N/A

Click on the [View](#) link to review the price sheet.

LI #	Cm Code	Commodity Code Description	Manufacturer	Pricing	Qty	%	Unit Price
1	0070-0020-0002	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)	Shevlapoodle	FP	1		\$ 8,900.00
2	0070-0020-0001	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)	Rammelpoolshank	FP	10		\$ 7,495.00
							Total: \$ 83,850.00

Close Reload

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Note that the pricing has indeed been reduced.

Click on the [Close](#) button to return to the "BAFO Proposal."

Once all documents have been reviewed scroll down to the "Items To Complete" section.

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Item	Status	Action	Notes
1. Solicitation Tabulation	-----	View	N/A
Items To Complete (For Internal Use Only)			
1. Evaluation(s) (Printable Eval COI)	-----	View	Complete
2. Clarification Request	-----	-----	Not Yet Required
3. Proposal Evaluation Report	Create	-----	Pending
4. Supplier References Questionnaire	-----	-----	Pending
5. Supplier Meeting Request(s)	Create	View	N/A
6. Negotiations	-----	-----	Not Yet Required
7. BAFO Request	-----	-----	Not Yet Required

Payment Terms

Contract Payment Terms:	Net 20	Contract Delivery:	12 A.R.O. Days
-------------------------	--------	--------------------	----------------

Confidential Information ?

Start | Novell-delivered Applicati... | ADOA: SPIRIT - Autom... | 12:37 PM

The next step in the process is to create a PER based upon the "BAFO Response."

BAFO Proposal Evaluation Report

With the creation of the "BAFO Request" and the receipt of the suppliers "BAFO Response" you now, in essence, have a new proposal.

It is now necessary to create a PER based upon the BAFO. When the "Create" link is clicked on, Spirit will generate a new PER based upon the previous evaluation. The scores for each of the criteria will be the scores that the system initially calculated based on evaluators scores and comments for the original evaluation. If you, the PO, opted to adjust any of the scores, for the previous PER they will not be apparent in those reproduced by Spirit.

The BAFO evaluation process differs from the original in that no individual evaluations or the forms are generated. The evaluation at this point begins with the PO and the generation of a PER.

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Items To Complete (For Internal Use Only)

Item	Description	Action	Status
1.	Solicitation Tabulation	View	N/A
1.	Evaluation(s) (Printable Eval COI)	View	Complete
2.	Clarification Request		Not Yet Required
3.	Proposal Evaluation Report	Create	Pending
4.	Supplier References Questionnaire		Pending
5.	Supplier Meeting Request(s)	Create View	N/A
6.	Negotiations		Not Yet Required
7.	BAFO Request		Not Yet Required

Payment Terms

Contract Payment Terms:	Net 20	Contract Delivery:	12 A.R.O. Days
-------------------------	--------	--------------------	----------------

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Start | <https://spiritest.az.gov/Applications/SPIRIT/PRO.nsf/Proc?Open&Login&Action=CreateEvalReportPro?Open&Login&DocNumPro=AD5M-5RAQ> | Novell-delivered Applicati... | ADOA: SPIRIT - Autom... | Internet | 12:41 PM

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Proposal Evaluation Report

Solicitation # AD040061-A1
Proposal # ADSM-5QRSVQ-1
Page loaded on 09/11/2003 at 12:33:54 PM.

♦ = Required Field

Proposal Information			
Proposal #:	ADSM-5QRSVQ-1	Solicitation #:	AD040061-A1
Sol Title:	Solicitation Creation		
Supplier Name:	Grants Tombs		
Created By:	Pete Mahnke/Arizona State Procurement Office	PO:	Pete Mahnke/Arizona State Procurement Office
BAFO #:	1	Status:	Draft
Date Created:	09/11/2003	Date Submitted:	

Proposal Evaluation Report

Criteria (Points) ♦ Pts Max

Note that this PER is based upon the new proposal.

Scroll down the screen to the "PER" section that allows for the entry of evaluation comments.

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Proposal Evaluation Report

Criteria (Points)	Pts	Max Pts
1. Conformance to Terms & Conditions and to Scope of Work	345	400
Categories:		
Strengths	evaluator/az.gov (300) Not too strong	
	Pete Mahnke/Arizona State Procurement Office (390) Extremely....	
Weaknesses	evaluator/az.gov (300) Yet not too weak	
	Pete Mahnke/Arizona State Procurement Office (390)	
2. Key Personnel/Qualifications	262	300

Done

Start | Novell-delivered Applicati... | ADOA: SPIRIT - Autom...

Internet

12:41 PM

As noted previously, the score is the original average of the evaluators scores based up the original proposal.

Evaluators comments and scores from the previous evaluation are included.

Enter comments appropriate to the PER for the BAFO. As with any previous PER, once complete, it will be routed to the evaluator(s) for their approval. Once approved, the PO will make the final approval of the report and the process will then be able to continue. REMEMBER to have the evaluators review the PER prior to submitting for their approval.

The PO must adjust the score. At least to the level of the previous PER. If warranted, the score can be increased based upon the BAFO response.

Of course it is possible the score could go down as well.

Comments for the other criteria must be entered as well. Adjust the scores as necessary as well.

If this category was not an issue or improved, you can note that and enter the same comments in the previous PER.

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Weaknesses	Pete Mahnke/Arizona State Procurement Office (90) \$10K higher than Azspo Test Great improvement evaluator/az.gov (90) Pete Mahnke/Arizona State Procurement Office (90)
Totals:	1000

Evaluator Approvals

Save as: ☐ Draft ☒ Submit to Evaluators for Approval

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If ready for the evaluator(s) approval, change the status to "Submit to Evaluators for Approval," and click on the button to complete.

Once submitted as complete you will be returned to the suppliers proposal.

BAFO Proposal Evaluation Report Approval

AD040061-A1 - Solicitation Creation				
Grants Tombs	ADSM-5QRSVQ	RFP	Complete (BAFO)	08/25/2003
Grants Tombs	ADSM-5QRSVQ-1	RFP	Complete	09/11/2003
Joe Azspo Test	ADSM-5QRQAC	RFP	Complete (BAFO)	08/25/2003
Joe Azspo Test	ADSM-5QRQAC-1	RFP	Complete	09/11/2003

The evaluator(s) approval is complete. The PO must now give the final approval of the report. Return to the "My Proposals" section of Spirit.

Click on the Proposal number link [ADSM-5QRSVQ-1](#). Once in the proposal, scroll to the bottom of the screen to the "Items To Complete" section and click on the "View" link for the PER.

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Item	Description	Action	Status
1.	Solicitation Tabulation	View	N/A
Items To Complete (For Internal Use Only)			
1.	Evaluation(s) (Printable Eval COI)	View	Complete
2.	Clarification Request		Not Yet Required
3.	Proposal Evaluation Report	View	Pending Evaluators Approval
4.	Supplier References Questionnaire	Create	Pending
5.	Supplier Meeting Request(s)	Create View	N/A
6.	Negotiations		Not Yet Required
7.	BAFO Request		Not Yet Required

Payment Terms

Contract Payment	Net 20	Contract Delivery:	12 A.R.O. Days
------------------	--------	--------------------	----------------

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Start | Novell-delivered Applicati... | ADDA: SPIRIT - Autom... | 12:44 PM

Click on the [View](#) link to "View" and "Approve" the PER for this supplier.

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4. Cost Still not perfect, but better... --- 100

Categories:

Strengths	eval uator/az.gov (90) Not as good as the other supplier
	Pete Mahnke/Arizona State Procurement Office (90) \$10K higher than Azspo Test
Weaknesses	Great improvement eval uator/az.gov (90)
	Pete Mahnke/Arizona State Procurement Office (90)

Totals: --- 1000


Evaluator Approvals Approve

eval uator/az.gov on 09/11/2003 at 12:36:12 PM

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Pending Evaluators Approval

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom... Internet 12:44 PM

Scroll to the bottom of the screen and click on the  button. The PER is now complete. For the sake of the manual, the approval of the PER for the other supplier is not included, but has been done.

Award Tabulation

The next step in the process takes place back at the solicitation.

To generate a "Tabulation" that allows you to select and award line items, you must first create a "Solicitation Evaluation Report." Spirit does most of the work once you click on the "Create" button.

From the "My Solicitations" list, click on the appropriate solicitation number link

[AD040061-](#)

[A1](#)

Once in the solicitation, scroll down to the "Related Documents\Information" section.

Related Documents\Information (For Internal Use Only)

1. Amendment(s)	Create	View
2. Tabulation	-----	View
3. Proposals	-----	View
4. Evaluation(s)	-----	View
5. Proposal Evaluation Reports	-----	View
6. Solicitation Evaluation Report	Create	-----
7. Tabulation	-----	-----
8. Contract	-----	-----

Solicitation Review Comments

I've added the Line Item you requested.

OK, thank you. Looks good to me.

Approvals

PO: Pete Mahrke/Arizona State Procurement Office	08/25/2003 12:12:11 PM
Customer: Pete Mahrke/Arizona State Procurement Office	08/25/2003 12:10:27 PM

Click on the "Create" link to generate the "Solicitation Evaluation Report" or SER.

Solicitation Evaluation Report**Solicitation # AD040061-A1**

Page loaded on 09/11/2003 at 02:55:53 PM.

Evaluation Criteria Key

Evaluation Criteria	Max Points
C1. Conformance to Terms & Conditions and to Scope of Work	400
C2. Key Personnel/Qualifications	300
C3. Methodology	200
C4. Cost	100

Please select the proposals you would like to view in the Tabulation Screen

Supplier	Report	Total	C1	C2	C3	C4
Initial Proposal						
<input type="checkbox"/> Grants Tombs	Report	840	350	262	138	90
<input type="checkbox"/> Joe Azspo Test	Report	820	338	262	120	100
BAFO #1						
<input type="checkbox"/> Grants Tombs	Report	885	365	280	150	90
<input type="checkbox"/> Joe Azspo Test	Report	812	338	262	112	100

Submit

Reset

The SER has been created.

Note the statement: Please select the proposals you would like to view in the Tabulation Screen.

The SER is a report that displays the final evaluation numbers for the proposals.

It contains the "Initial Proposal" evaluation points and the "BAFO #1" scores. To award a contract(s) you must create a "Tabulation," however, prior to that you must select the proposals that you want to be available for selection.

Since the "Initial Proposal" is no longer appropriate due to BAFO, you would select from the "BAFO #1" proposals. Although nothing prevents you from selecting them all.

The "Report" links bring you to the PER.

Click within the checkbox to select the proposal(s)

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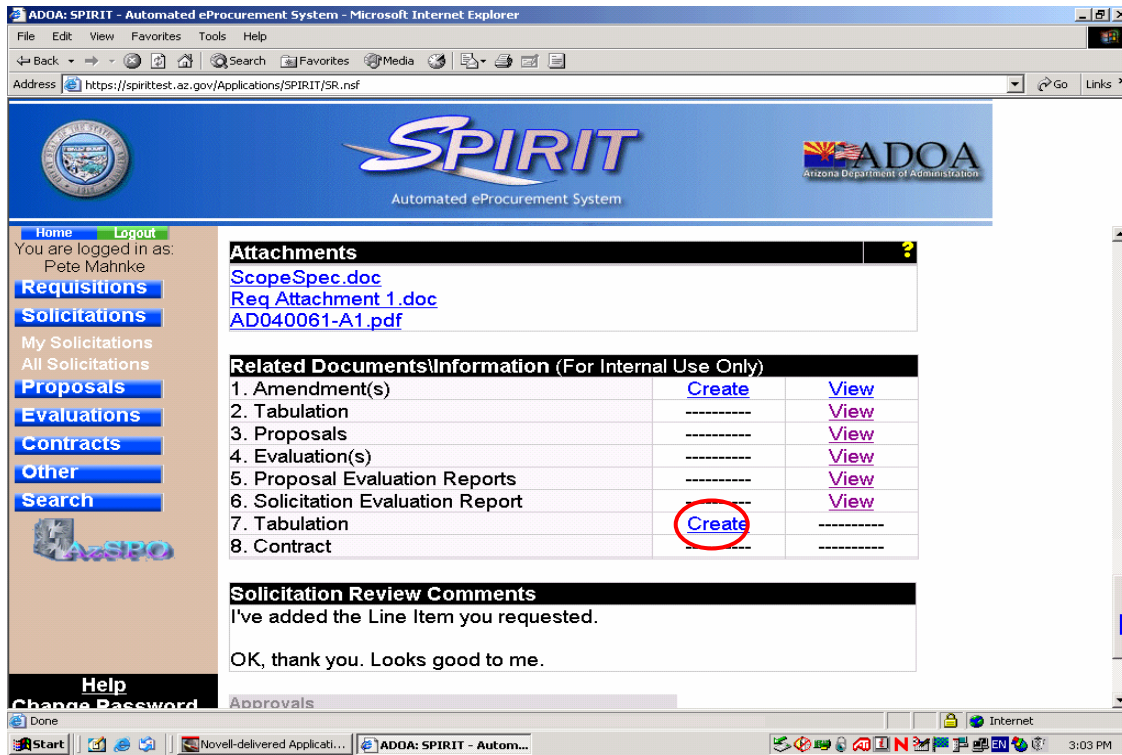
Supplier	Report	Total	C1	C2	C3	C4
Initial Proposal						
<input type="checkbox"/> Grants Tombs	Report	840	350	262	138	90
<input type="checkbox"/> Joe Azspo Test	Report	820	338	262	120	100
BAFO #1						
<input checked="" type="checkbox"/> Grants Tombs	Report	885	365	280	150	90
<input checked="" type="checkbox"/> Joe Azspo Test	Report	812	338	262	112	100

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Once you have placed checkmarks in the appropriate checkboxes, click on the  button.

You are now back at the solicitation. The "Tabulation" can now be created.

Scroll down to the "Related Documents\Information" section of the solicitation.



NOTE: if you found it necessary to change the proposals selected for the SER, click on the "View" link. The selections are not locked in and can be changed if a contract has not been created.

The same is true of the Tabulation. If you select the wrong line items to award, yet have not created a contract draft you can make new selections in the SER and Tabulation.

Click on the [Create](#) link at **7. Tabulation** to generate the "Tabulation."

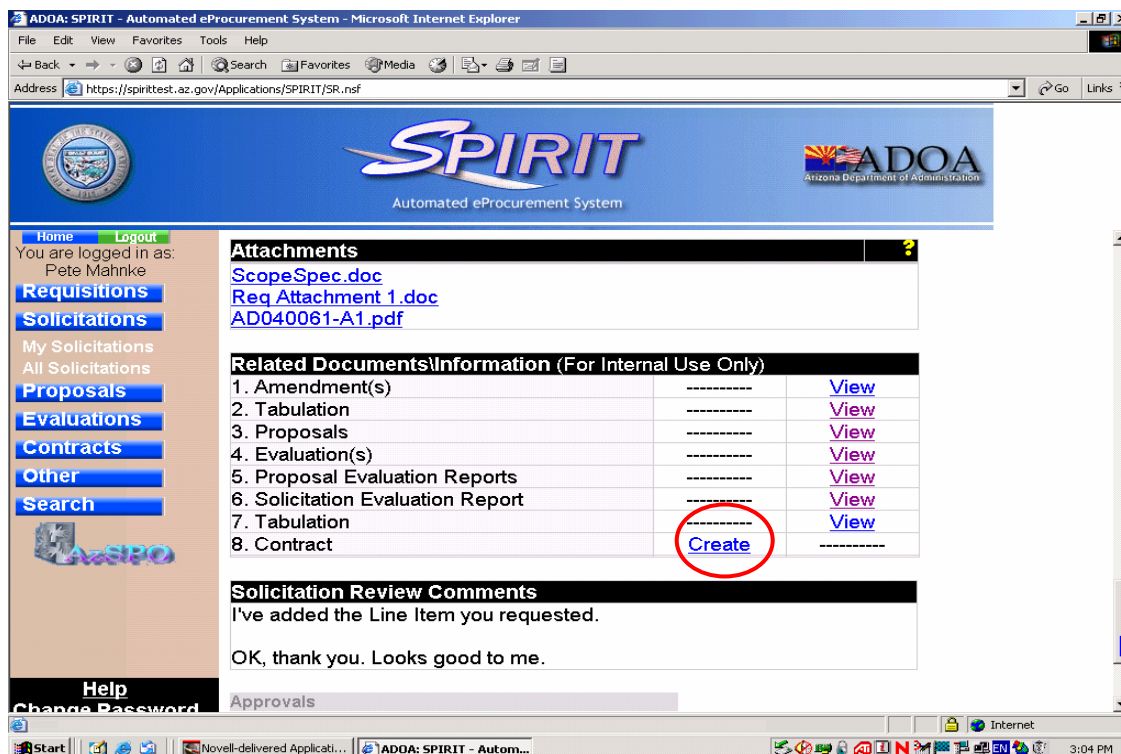
Tabulation By Group Solicitation # AD040061-A1						
Solicitation RFP Type:		Tabulation Grouping:		By Line Items ?		
Solicitation Evaluation Report						
Supplier	Manufacturer	Qty	%	Unit Price	Ext Price	
1 0070-0020 Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) 0070-0020-0002 All Terrain						
Grants Tombs	Shevlapoodle	1		\$ 8,900.00	\$ 8,900.00	<input type="checkbox"/> Award
Joe Azspo Test	Fleebell	1		\$ 7,800.00	\$ 7,800.00	<input type="checkbox"/> Award
2 0070-0020 Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) 0070-0020-0001 Motor Scooters						
Grants Tombs	Rammelpoolshank	10		\$ 7,495.00	\$ 74,950.00	<input type="checkbox"/> Award
Joe Azspo Test	Fleebell	10		\$ 9,215.00	\$ 92,150.00	<input type="checkbox"/> Award

The tabulation incorporates the line items from each of the suppliers selected in the SER.

The [Solicitation Evaluation Report](#) link, if clicked on, would return you to that report so that you could view the scores. At the tabulation, click within the appropriate checkboxes to select the Line Item(s) to award. You could select one from each supplier if that was appropriate.

Click on the button once the selections have been made.

NOTE: You may change these selections prior to creating a contract. They are not permanently locked in at this time.



After submitting the "Tabulation" you are returned to the solicitation. Scroll back down to the "Related Documents\Information" section of the solicitation to create the contract.

8. Contract now has a "Create" link. The contract(s) can now be assembled.

Contracts

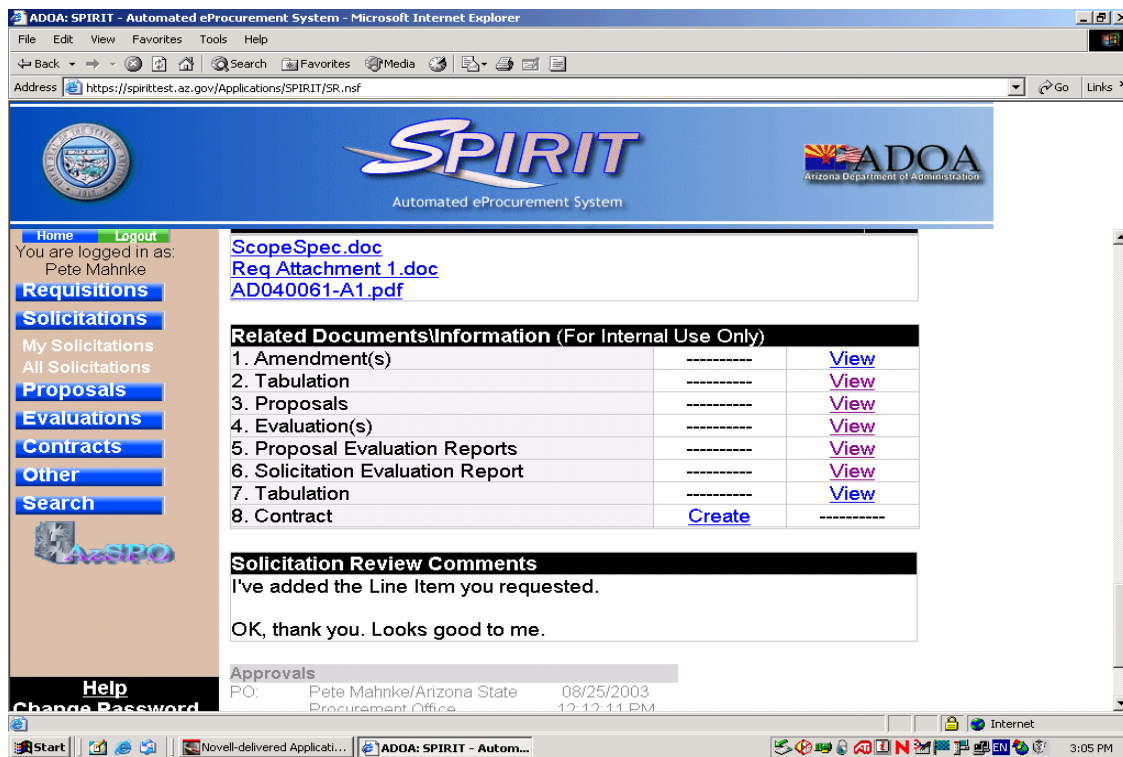
Contract Creation

This section covers creating a contract in Spirit.

Just prior to this step you checked off the line items to award from the Tabulation containing the suppliers you selected from the SER.

One way in which contracts differ from what we're familiar with is the "Main Contract." Below in the Related Documents\Information" section of the solicitation. When you click on the "Create" button for number 8. Contract the system generates the "Main Contract." This "Main Contract" contains the information that is common to all the suppliers awarded contracts. You select the "Term of Contract," "Delivery," and select whether the contract is extendable and for how long. The "Main Contract" allows for the attachment of common documents relevant to all contractors; **be sure to attach all the files relevant to all suppliers on this contract.** Once you complete the main contract you will not be able to attach further documents, however, you still will be able to attach files to the individual supplier contracts.

Once the "Main Contract" is submitted as complete, Spirit generates the individual supplier contracts. These contracts inherit all the common data contained in the "Main Contract," with the added functionality of attaching documents appropriate to the individual contractor's contract. Amendments specific to an individual contractors contract are created from this contract.



8. Contract

Click on the [Create](#) link to generate the "Main Contract."

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Solicitation #AD040061-A1
Page loaded on 09/11/2003 at 02:57:59 PM.

• = Required Field

Document Information			
Type:	Main	Amendment:	No
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061-A1
Created By:	Jon Kopperud/az.gov	Date Created:	09/11/2003
PO Assigned:	Pete Mahrke/Arizona State Procurement Office	Date Completed:	
PM Assigned:	Rex Martin/Arizona State Procurement Office	PA Assigned:	Katherine Babonis/Arizona State Procurement Office
Gov't Entity:	Arizona State Procurement Office	Type:	Agency
Process Status:	Pending Contract	Status:	Draft

Contract Information

Contract: AD040061-A1-0

The "Draft" of the contract to the solicitation is created.

The "Document Information" section includes all relevant information to the solicitation. The requisition, solicitation and "created by" are links to those documents. This "Main Contracts" number is the solicitation number followed by -0. Each additional supplier contract will be -1, -2 and so on.

Note that at the bottom of this screenshot: "Process Status:" is "Pending Contract" and the Status of the "Main Contract" is "Draft."

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Contract Information

NOTE: As a State Agency, you are only allowed to use contracts that are either Statewide Contracts or contracts that are assigned to your Agency. You are not allowed to use other Agency Contracts.

Start Date: 9/11/2003 End Date: 09/11/2004

Term: 1 Year(s) FOB:

☐ Contract Extension Allowed Max Extension*: 1 Year(s)

Note: Max Extension Period is only required when Contract Extensions are allowed.

Solicitation Information

Title: Solicitation Creation Type: RFP

Description:
Solicitation creation

Sections - Clauses

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[Special Terms and Conditions](#)
[Uniform Instructions](#)
[Uniform Terms and Conditions](#)

Other Data

[* Price Sheet](#)

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3:05 PM

The "Contract Information" section is where you will enter some of the information common to all suppliers on contract. The "NOTE," regarding contract extension period is viewable to outside users.

You may select a different "Start Date" if appropriate, from the drop down menu.

If contract extension is allowed, click within the checkbox to indicate it.

Contract "Term" should be entered. The drop down menu allows for selection of year(s) or month(s)

Type in the delivery information.

Enter the maximum extensions allowed. Year(s) or Month(s) can be selected from the drop down.

Solicitation Information

Title: Solicitation Creation Type: RFP

Description: Solicitation creation

Sections - Clauses

[Special Instructions](#)

[Special Terms and Conditions](#)

[Uniform Instructions](#)

[Uniform Terms and Conditions](#)

Other Data

* [Price Sheet](#)

Attachments

[ScopeSpec.doc](#)

[Req Attachment 1.doc](#)

[AD040061-A1.pdf](#)

All Contracts

Contract #	Supplier	Status	Start Date	End Date	Amend	Amend #
AD040061-A1-0	Main	Draft	09/11/2003	09/11/2004	No	0

The "Solicitation Information" section contains basic solicitation information. You would be able to view any of this by clicking on the solicitation number link at the top of this contract.

"Other Data" *Price Sheet is the contract price sheet. In this "Main Contract" each suppliers line items are listed with links to more detail. When the individual contractors contracts are viewed, you may notice there is more documentation in this section. This additional information will also be links and will include the "Offer & Acceptance," supplier specific "price sheet" and any "BAFO" document if created.

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Other Data
[* Price Sheet](#)

Attachments
Add Remove

[ScopeSpec.doc](#)
[Req Attachment 1.doc](#)
[AD040061-A1.pdf](#)

All Contracts

Contract #	Supplier	Status	Start Date	End Date	Amend	Amend #
AD040061-A1-0	Main	Draft	09/11/2003	09/11/2004	No	0

Save as: ☒ Draft ☐ Complete

Submit Reset

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Done

Start Novell-delivered Applicati... ADOA: SPIRIT - Autom... Internet 3:05 PM

Any "attachments" added to the "Main Contract" need to be common to all suppliers. You might attach a spreadsheet containing additional evaluation information, etc.

The "All Contracts" section will contain links to any supplier contracts once the "Main Contract" has been submitted as "Complete."

For practice sake, Click on the  button to save it as "Draft" so you can view the link for the contract from the solicitation for familiarization.

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Contract #	Supplier	Status	Start Date	End Date	Amend	Amend #
AD040061-A1-0	Main	Draft	09/11/2003	09/11/2004	No	0

[View](#)
[View](#)
[View](#)
[View](#)
[View](#)
[View](#)
[View](#)

Solicitation Review Comments
I've added the Line Item you requested.
OK, thank you. Looks good to me.

Approvals
PO: Pete Mahnke/Arizona State Procurement Office 08/25/2003 12:12:11 PM
Customer: Pete Mahnke/Arizona State Procurement Office 08/25/2003 12:10:27 PM

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Once you have submitted the contract as Draft, you are back at the solicitation. Scroll to the bottom of the solicitation and click on the View link for contract to return to your draft.

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Contracts By Main Contract
Page loaded on 09/11/2003 at 02:59:04 PM

The "Contracts By Main Contract" screen opens.
Click on the "Main Contract" number link to open.

Contract #	Supplier	Status	Start Date	End Date	Amend	Amend #
AD040061-A1-0	Main	Draft	09/11/2003	09/11/2004	No	0

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The "Contracts By Main Contract" screen opens (image previous page). Click on the "Main Contract" number link to open. Click on the contract number link ([AD040061-A1-0](#))


Like most documents saved in Spirit as "Draft" the return view is "View" mode.
Click on the "edit" icon to open so that you can complete the contract.

Contract
Solicitation #AD040061-A1
Page loaded on 09/11/2003 at 02:59:41 PM.

Document Information			
Type:	Main	Amendment:	No
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061-A1
Created By:	Jon Kopperud/az.gov	Date Created:	09/11/2003
PO Assigned:	Pete Mahnke/Arizona State Procurement Office	Date Completed:	
PM Assigned:	Rex Martin/Arizona State Procurement Office	PA Assigned:	Katherine Babonis/Arizona State Procurement Office
Gov't Entity:	Arizona State Procurement Office	Type:	Agency
Process Status:	Pending Contract	Status:	Draft

Like most documents saved in Spirit as "Draft" the return view is "View" mode.

Click on the "edit" icon  to open so that you can complete the contract.

Scroll to the bottom of the screen, change the status to "Complete" and click on the  button.

Once again you are back at the solicitation. Again, scroll to the bottom of the screen to access the contract(s).

Click on [View](#) to open the contract

Contracts

By Main Contract

Page loaded on 11/14/2003 at 01:24:24 PM.

Contract #	Supplier	Status	Start Date	End Date	Amend	Amend #
AD040061-A1-0	Main	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1	Grants Tombs	Complete	09/11/2003	09/11/2004	No	0

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The "Main Contract" is listed and now the supplier specific contract is listed as well.

Click on the supplier contract link ([AD040061-A1-1](#)).

The screenshot shows the ADOA SPIRIT web application in Microsoft Internet Explorer. The browser address bar shows <https://spiritest.az.gov/Applications/SPIRIT/SR.nsf>. The page header includes the ADOA logo and the text "Contract management functions are available now." The main content area displays the "Contract" details for "Solicitation #AD040061-A1". The page was loaded on 09/11/2003 at 03:00:09 PM. The "Document Information" table is shown below.

Document Information			
Type:	Supplier	Amendment:	No
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061-A1
Created By:	Jon Kopperud/az.gov	Date Created:	09/11/2003
PO Assigned:	Pete Mahnke/Arizona State Procurement Office	Date Completed:	09/11/2003
PM Assigned:	Rex Martin/Arizona State Procurement Office	PA Assigned:	Katherine Babonis/Arizona State Procurement Office
Supplier Name:	Grants Tombs	Proposal #:	ADSM-5QRSVQ-1
Gov't Entity:	Arizona State	Type:	Agency

Contract management functions are available now.

The "Request Amendment" button (within red square image previous page), functions somewhat like an amendment that we create today. Clicking on this button generates a window that you can type in. You would type the reason for the amendment; once complete, the system would send an e-mail to the contractor, thereby opening the door to communication.

The contractor has a "Request Amendment" button as well. It functions primarily the same way it does on this end. Once the PO receives the "Request," he or she can decide whether it is warranted and create an amendment.

The "Create Amendment" link is used to create an amendment. The Spirit system will generate a duplicate of the contract, that once signed off on by both would be the active contract.

This process functions much like the solicitation amendment. The main difference being that the PO makes any changes to pricing, etc. and if acceptable, the contractor signs off in agreement. So control of the document is in the hands of the procurement office, not the contractor.

NOTE: when an amendment to a contract has been approved by all parties, it is necessary to go into the original contract that was amended and cancel it. If this is not done users will not know which one to use as they will both show as active.

Clicking on the "Cancel Contract" link would cancel this specific contract. Canceling the entire contract for all contractors would be done at the "Main Contract" screen.

ADOA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer

Address: <https://spirittest.az.gov/Applications/SPIRIT/SR.nsf>

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* [Price Sheet](#)
* [BAFO](#)

Attachments

Add Remove

[ScopeSpec.doc](#)
[Req Attachment 1.doc](#)
[AD040061-A1.pdf](#)
[Rangle BAFO Attachment.doc](#)

All Contracts

Contract #	Supplier	Status	Start Date	End Date	Amend	Amend #
AD040061-A1-0	Main	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1	Grants Tombs	Complete	09/11/2003	09/11/2004	No	0

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Internet

3:07 PM

You may attach any supplier specific documents to each individual suppliers contract by clicking on the **Add** in the attachments section; it functions the same as with attachments to solicitations. Any bonds or insurance certificates that arrive after award can be scanned and attached.

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Page loaded on 09/11/2003 at 03:00:09 PM

Document Information

Request Amendment
[Create Amendment](#) | [Cancel Contract](#)

Type:	Supplier	Amendment:	No	Amend. 0
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061-A1	Contract AD040061-A1-1
Created By:	Jon Kopperud/az.gov	Date Created:	09/11/2003	
PO Assigned:	Pete Mahnke/Arizona State Procurement Office	Date Completed:	09/11/2003	
PM Assigned:	Rex Martin/Arizona State Procurement Office	PA Assigned:	Katherine Babonis/Arizona State Procurement Office	
Supplier Name:	Grants Tombs	Proposal #:	ADSM-5QRSVQ-1	
Gov't Entity:	Arizona State Procurement Office	Type:	Agency	
Process Status:	Complete	Status:	Complete	

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Internet

3:08 PM

Contract Amendment

Contract
Solicitation #AD040061-A1
 Page loaded on 11/14/2003 at 02:19:46 PM.

Document Information

Request Amendment			
Type:	Supplier	Amendment:	No
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061-A1
Created By:	Jon Kopperud/az.gov	Date Created:	09/11/2003
PO Assigned:	Pete Mahnke/Arizona State Procurement Office	Date Completed:	09/11/2003
PM Assigned:	Rex Martin/Arizona State Procurement Office	PA Assigned:	Katherine Babonis/Arizona State Procurement Office
Supplier Name:	Grants Tombs	Proposal #:	ADSM-5QRSVQ-1
Gov't Entity:	Arizona State	Type:	Agency

To create an amendment click on the [Create Amendment](#) link.

Contract Amendment

NOTE: As a State Agency, you are only allowed to use contracts that are either Statewide Contracts or contracts that are assigned to your Agency. You are not allowed to use other Agency Contracts.

Start Date: 9/11/2003 End Date: 09/10/2004

Term: 1 Year(s) FOB: Destination

Payment Terms: Net 20 Delivery: 12 A.R.O. Days

Contract Extension Allowed Max Extension: 2 Year(s)

Amendment Information

Contract Reassignment

Reassign: Search

N/A

Contractor Amendment Approval

Not Yet Approved

Solicitation Information

Title: Solicitation Creation Type: RFP

The manual has taken the liberty of scrolling down to roughly the middle of the amendment draft screen to the Contract Information section.

Note that you can use the drop down menus to change various information. To change the Start and End date, simply select the new start date. The System will not recalculate the new End Date until the amendment has been submitted as "Draft" at the least.

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NOTE: As a State Agency, you are only allowed to use contracts that are either Statewide Contracts or contracts that are assigned to your Agency. You are not allowed to use other Agency Contracts.

Start Date: 9/11/2003 End Date: 09/10/2004
Term: 1 Year(s) FOB: Destination
Payment Terms: Net 20 Delivery: 12 A.R.O. Days
Contract Extension Allowed Max 2 Year(s)
Extension:

Amendment Information

Contract Reassignment
Reassign Search

N/A

Contractor Amendment Approval
Not Yet Approved

Solicitation Information
Title: Solicitation Creation Type: RFP

Use the Amendment Information section to enter the language describing what is being amended.

This amendment will affect pricing, so it will be necessary to visit the Price Sheet to make the necessary change(s).

Contract Reassignment will be covered in the section following this contract amendment lesson.

Scroll down to and click on the [* Price Sheet](#) link to make the necessary changes to the pricing for the amendment.

LI #	Com. Code Com. Code Item	Com. Code Desc. Com. Code Item Desc.	Manufacturer	Qty	%	Unit Price	Ext Price	Add
1	0070-0020	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)	Shevlapoodle	1		\$ 8,900.00	\$ 8,900.00	Remove
	0070-0020-0002	All Terrain						
2	0070-0020	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles)	Rammelpoolshank	10		\$ 7,495.00	\$ 74,950.00	Remove
	0070-0020-0001	Motor Scooters						

[Add Line Item](#)
[Close](#)
[Reload](#)

[* Offer & Acceptance](#)
[* Price Sheet](#)

Attachments
[Add](#)
[Remove](#)

[Reg Attachment 1.doc](#)
[AD040061_A1.pdf](#)

In this instance, the pricing change will be made to Line Item number **2**. To edit the pricing click on the Line Item number in question. The Line Item window will open in a "draft" mode, allowing for editing.

Click on the Line Item number to open the Line Item for editing.

Note in the image of that the information is in edit mode. Make any appropriate changes.

In this instance, the PO has changed the Unit Price from to

If this is the only change necessary to the Line Item, scroll to the bottom of the Contract Line Item screen and click on the Submit button.

Click on if complete. Note, you may return and make changes even though you have submitted the change as "Complete."

If you open the Line Item again, it will still be in edit mode.

Once the line item is submitted you will be returned to the Supplier Contract Price Sheet. If no other changes to the prices are necessary, you may close the document, by scrolling to the bottom and clicking on the button.

With the Price Sheet closed; you are now back at the contract amendment draft. Once all changes necessary have been made, scroll to the bottom of the contract amendment screen and Submit.

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AD040061-A1.ppt
ScopeSpec.doc
Rangle BAFO Attachment.doc

All Contracts

Contract #	Supplier	Status	Start Date	End Date	Amend	Amend #
AD040061-A1-0	Main	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1	Grants Tombs	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1-A1	Grants Tombs	Draft	09/11/2003	09/10/2004	Yes	1

Save as: ☒ Draft ☐ Submit To Contractor for Approval ☐ Cancel
☐ Complete

Submit Reset

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Done

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Save As:

Draft - allows you to return to the amendment to complete at a later time.

Submit to Contractor for Approval - submits the amendment for electronic signature (bilateral)

Cancel - cancels the amendment draft. If an amendment draft is cancelled, the PO can use the cancelled amendment draft for a future amendment if the need arises. The status will show as cancelled, but it can be edited at a later time and submitted to the Contractor for Approval or unilaterally completed.

Complete - this allows the PO the functionality to complete an amendment unilaterally and does not require an electronic signature by the contractor. It is also used after the supplier contractor has approved the amendment. At that time the PO must go into the amendment and submit as complete. REMEMBER to cancel the original contract amended after completion.

For the purpose of the manual, this amendment will be submitted to the contractor for their approval.


Change the status to Submit to Contractor for Approval and click on the  button.

You will then be returned to the My Contracts by Contract Number screen.

Contract Number	Contract Name	Status	Start Date	End Date	Approved	Count
AD040069-2-A1	Azspo Test	Draft	09/16/2003	09/15/2004	Yes	1
AD040061-A1						
AD040061-A1-0	Main	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1	Grants Tombs	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1-A1	Grants Tombs	Approved By Contractor	09/11/2003	09/10/2004	Yes	1
AD040044						
AD040044-0	Main	Complete	08/05/2003	08/05/2004	No	0
AD040044-1	Joe Azspo Test	Complete	08/05/2003	08/05/2004	No	0
AD040043						
AD040043-0	Main	Complete	08/05/2003	08/05/2004	No	0
AD040043-1	Joe Azspo Test	Complete	08/05/2003	08/05/2004	No	0
	Joe					

The PO will from time to time need to check on the status of the contract amendment. In the image above the status indicates that the amendment has been approved by the contractor. Once approved by the contractor, the PO will need to go back to the amendment to complete/finalize the amendment.

Click on the amendment number link [AD040061-A1-1-A1](#).

Once in the amendment, remember that the document will be in View mode. You must click on the Edit Icon  (red pencil) to complete the amendment.

Once in edit mode, scroll to the bottom of the amendment screen to complete the amendment.

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AD040061-A1.pdf
ScopeSpec.doc
Rangle BAFO Attachment.doc

All Contracts

Contract #	Supplier	Status	Start Date	End Date	Amend	Amend #
AD040061-A1-0	Main	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1	Grants Tombs	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1-A1	Grants Tombs	Approved By Contractor	09/11/2003	09/10/2004	Yes	1

Save as: ☐ Update ☐ Cancel ☒ Complete

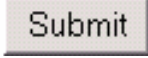
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Pending Contractor Approval

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2:51 PM

Change the status from Update (the default in this instance) to Complete and click on the  button. This is your electronic signature.

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Contracts

Contract Number	Contract Name	Status	Start Date	End Date	Yes	No
AD040069-1	Grants Tombs	Complete	09/16/2003	09/16/2004	No	0
AD040069-1-A1	Grants Tombs	Draft	09/16/2003	09/16/2004	Yes	1
AD040069-2	Joe Azspo Test	Complete	09/16/2003	09/16/2004	No	0
AD040069-2-A1	Joe Azspo Test	Draft	09/16/2003	09/15/2004	Yes	1
AD040061-A1						
AD040061-A1-0	Main	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1	Grants Tombs	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1-A1	Grants Tombs	Complete	09/11/2003	09/10/2004	Yes	1
AD040044						
AD040044-0	Main	Complete	08/05/2003	08/05/2004	No	0
AD040044-1	Joe Azspo Test	Complete	08/05/2003	08/05/2004	No	0

Once submitted, the user (PO) will be routed to the My Contracts By Contract Number screen.

Click on the original contract number link [AD040061-A1-1](#)

As noted previously, the user must cancel the previous version of a contract once an amendment has been completed.

ADDA: SPIRIT - Automated eProcurement System - Microsoft Internet Explorer provided by ADDA LAN

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Contracts

Contract
Solicitation #AD040061-A1
Page loaded on 11/14/2003 at 02:44:08 PM.

Document Information

Type	Supplier	Amendment	No	Amend. #
Requisition #:	ADSM-5QNUQB	Solicitation #:	AD040061-A1	Contract AD040061-A1-1
Created By:	Jon Kopperud/az.gov	Date Created:	09/11/2003	
PO Assigned:	Pete Mahnke/Arizona State Procurement Office	Date Completed:	09/11/2003	
PM Assigned:	Rex Martin/Arizona State Procurement Office	PA Assigned:	Katherine Babonis/Arizona State Procurement Office	
Supplier Name:	Grants Tombs	Proposal #:	ADSM-5QRSVQ-1	
Gov't Entity:	Arizona State	Type:	Agency	

[Request Amendment](#)
[Cancel Contract](#)

Click on the **Cancel Contract** link to complete the process.

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Attachments

[Req Attachment 1.doc](#)
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[ScopeSpec.doc](#)
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All Contracts

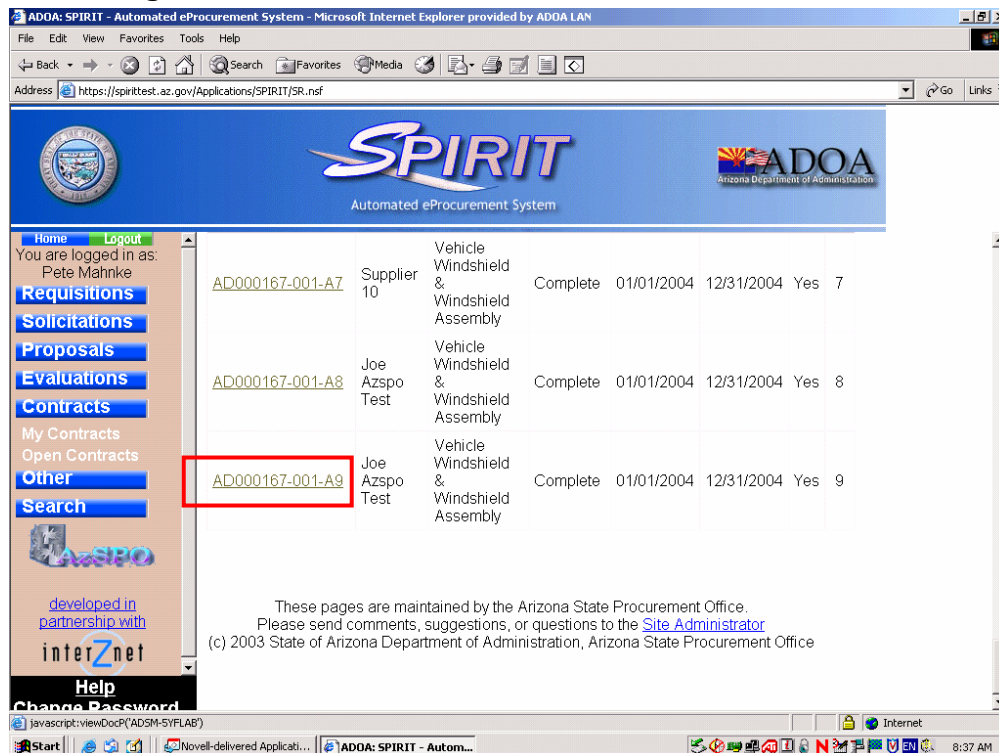
Contract #	Supplier	Status	Start Date	End Date	Amend	Amend #
AD040061-A1-0	Main	Complete	09/11/2003	09/11/2004	No	0
AD040061-A1-1	Grants Tombs	Complete (Cancelled)	09/11/2003	09/11/2004	No	0
AD040061-A1-1-A1	Grants Tombs	Complete	09/11/2003	09/10/2004	Yes	1

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Note that the status of the original contract is Complete (Cancelled). If the step on cancellation is skipped users may not be purchasing from the most current contract document.

Next up Reassigning Suppliers.

Contract Reassignment



At times it is necessary to reassign a contract to a new supplier. This demo covers the steps to follow, when and if the need arises.

Click on the contract number link of the contract you must reassign. In this instance [AD000167-001-A9](#)

Contract
Solicitation #AD040184
 Page loaded on 06/23/2004 at 08:14:01 AM.

Document Information

[Create Amendment](#) | [Cancel Contract](#)

Once in the contract, click on the [Create Amendment](#) link at the top of the document.

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Payment Terms: 1% 30 Days
Contract Extension Not Allowed

Delivery: A.R.O. Days
Max 0 Year(s)
Extension:

Amendment Information

Contract Reassignment
Reassign Search
N/A

Contractor Amendment Approval
Not Yet Approved

Solicitation Information
Title: Vehicle Windshield & Windshield Assembly Type:
Description: Vehicle Windshield & Windshield Assembly

Sections - Clauses
None Found

interZnet
developed in partnership with

Complete

Start Novell-delivered Applicati... ADDA: SPIRIT - Autom... 8:37 AM

Once the amendment draft is created, scroll down to the middle of the document to the Amendment Information section. Beneath this data entry field is the Contract Reassignment functionality.

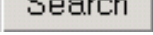
There are two ways to reassign a contract. One way is to type the name of the supplier that you need to assign the contract to, in the Search field. Or, you can click on the Reassign button and scroll through the list of suppliers in the database. In either instance, once the supplier is located in the database, you must click on their name link. This will load the new supplier as the contractor for a contract.

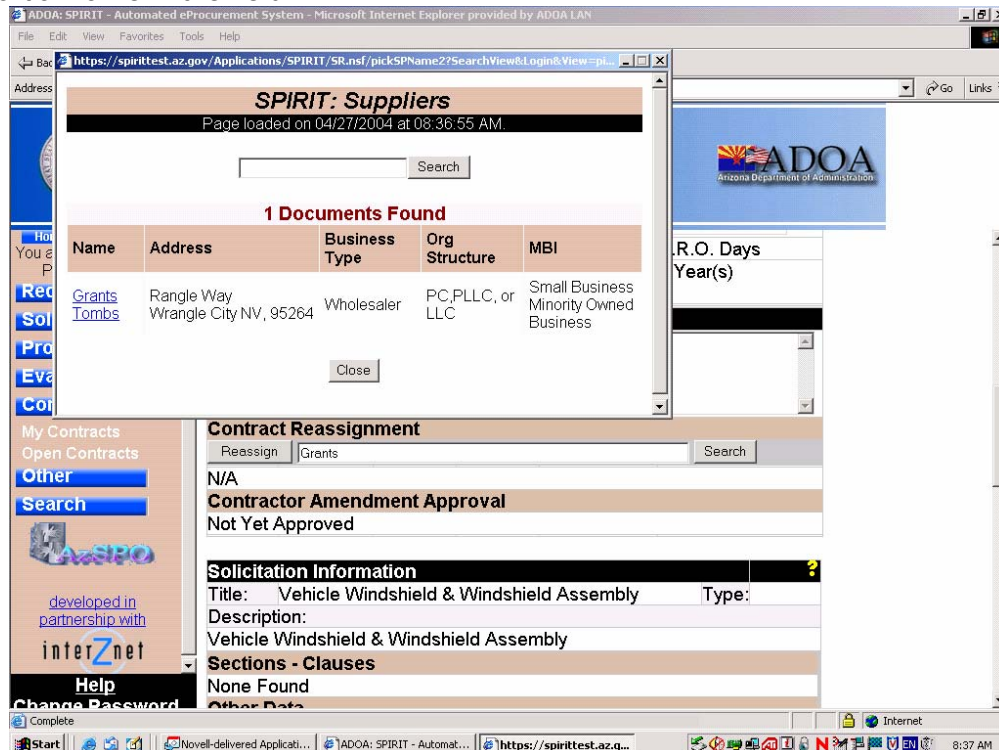
Note the N/A beneath the Reassign button. Once the new supplier is selected, this area will indicate the previous contractor.

The manual will follow the first of the two options for reassignment.

Amendment Information	
Contract Reassignment	
Reassign	Grants*
Search	
N/A	

In the manual, this contract is being reassigned to Grant's Tombs. Type in the name of the supplier that you wish to assign the contract to. With all searches, it is best to type only a partial name with an * (asterisk) as a wildcard. Doing so will avoid any misspellings/typos that

may yield no results in your search. Click on the  button once you have typed the name/partial name in the field.



SPIRIT: Suppliers
Page loaded on 04/27/2004 at 08:36:55 AM

Search

1 Documents Found

Name	Address	Business Type	Org Structure	MBI
Grants Tombs	Rangle Way Wrangle City NV, 95264	Wholesaler	PC, PLLC, or LLC	Small Business Minority Owned Business

Close

Contract Reassignment
Reassign Grants Search
N/A

Contractor Amendment Approval
Not Yet Approved

Solicitation Information
Title: Vehicle Windshield & Windshield Assembly Type:
Description: Vehicle Windshield & Windshield Assembly

Sections - Clauses
None Found

Other Data

If there were more suppliers with Grants in the name they would be listed with the results.

If this is the supplier you will be assigning the contract to, click on the supplier name link

[Grants Tombs](#)

. This will load them into the contract as the contractor.

Amendment Information	
Contract Reassignment	
Reassign	Grants* <input type="text"/> <input type="button" value="Search"/>
Previous Supplier: Allund Everything	
Contractor Amendment Approval	
Not Yet Approved	

Note that the amendment now indicates Allund Everything as the previous supplier.

Document Information				?
Type:	Supplier	Amendment:	Yes	Amend. 1
Requisition #:	ADSM-5ZMPW6	Solicitation #:	AD040184	Contract AD040184-1-#:
Created By:	Notes Administrator/az.gov	Date Created:		06/23/2004
PO Assigned:	Pete Mahnke/Arizona State Procurement Office	Date Completed:		
PM Assigned:	Rex Martin/Arizona State Procurement Office	PA Assigned:		Procurement Administrator/Arizona State Procurement Office
Supplier Name:	Grants Tombs	Proposal #:		ADSM-5ZMQ7W
Gov't Entity:	Arizona State Procurement Office	Type:		Statewide
Process Status:	Pending Contract Amendment	Status:		Draft

Were you to scroll back up the amendment to the Document Information section, you would see that Grants Tombs is now the supplier on this contract.

Amendment Information	
Contract Reassignment	
Reassign	Grants* <input type="text"/> <input type="button" value="Search"/>
Previous Supplier: Allund Everything	
Contractor Amendment Approval	
Not Yet Approved	

Don't forget to indicate why this amendment is being published. SPIRIT does not do any of this for you. Once done, scroll to the bottom of the document and submit it for completion.

All Contracts							
Contract #	Supplier	Title	Status	Start Date	End Date	A	A#
AD040184-0	Main	Test Line Item info (Part#)	Complete	06/04/2004	06/03/2005	No	0
AD040184-1	Allund Everything	Test Line Item info (Part#)	Complete	06/04/2004	06/03/2005	No	0
AD040184-1-A1	Allund Everything	Test Line Item info (Part#)	Draft	06/04/2004	06/03/2005	Yes	1

Save as: ☒ Draft ☐ Submit To Contractor for Approval ☐ Cancel
☐ Complete

If you intend on finishing the amendment at a later time, leave the Save as: as Draft and click on the Submit button.

If you require the suppliers electronic signature on the amendment, change the Save as: to Submit to Contractor for Approval and click on the Submit button.

Or you may complete the amendment unilaterally by changing the Save as: to Complete and click on the Submit button. If done unilaterally, you're done, if not, you will have to wait for the supplier to approve the amendment. You then must give the document the final approval.

Don't forget to cancel the original contract after the amendment is approved and completed.